PlanWell®
Digital Document Management & Distribution

PlanWell Enterprise

User Manual

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PlanWell Enterprise

Finding PlanWell and Logging On

The PlanWell service is simple to use, and its e-commerce functions are likely to be familiar. You don't need any special tools or software to use it; just make sure your Web browser is current (Microsoft Internet Explorer v.5.5 or higher; or Netscape v.6.0 or higher).

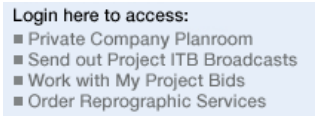
You may access PlanWell from your reprographer's website by first typing in the Web address for the home page of your reprographer. Click on the PlanWell link provided on that site to access PlanWell's log in page. If you currently are not working with a PlanWell provider, a list of providers in your area can be located at www.planwell.com.

PlanWell Homepage

From the PlanWell homepage, you will have 3 different project access points.

Login to your Account

Each company using PlanWell as their method for posting projects online will have their own independent planroom. Company employees may use the "Login to your Account" access point to view a complete listing of all projects. You will be required to enter a company username and password to enter the planroom and then a project-specific password to view any project.


Login here to access:
Private Company Planroom
Send out Project ITB Broadcasts
Work with My Project Bids
Order Reprographic Services

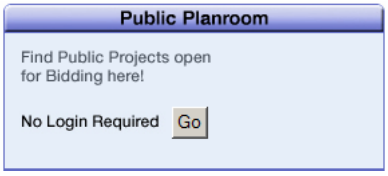
Listing of all PlanWell Services Offered

Noted within the “Login to my Account” section are any additional services your PlanWell provider is offering; specifically PlanWell BidCaster and PlanWell EWO. Your one PlanWell login will access each PlanWell program offered by your provider. These programs are discussed in detail later in this document.

Public Planroom
All public projects hosted by your reprographer will be listed in this planroom. It is not necessary to enter a username or password to enter this planroom or to view any of these public projects.

Guest Access
This access point will bring a user directly into one specific project. The user must enter in a project number and the project-specific password. This access point is often used by subcontractors.

Public Projects



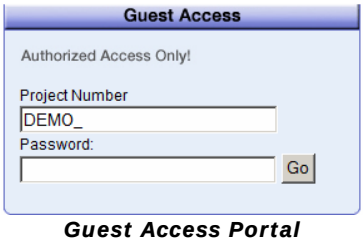
Public Project Portal

Accessing the Public Planroom can be done by first selecting the [Go] button.

All public projects hosted by your reprographic shop will be posted. As mentioned earlier, no username or password will be required to view any of these projects. You may view a project and potentially begin the order placement process by clicking on the project number of the desired project. Details on the remainder of the project viewing and ordering process are outlined in detail below under Company Projects.

Note: Although you may view public projects without a username or password, once you begin the ordering process, the user login window will appear and you will be prompted to enter in this information. It is not necessary however to be a registered user to order through PlanWell. Further information for Non-Registered users is documented later in this document.

Guest Access



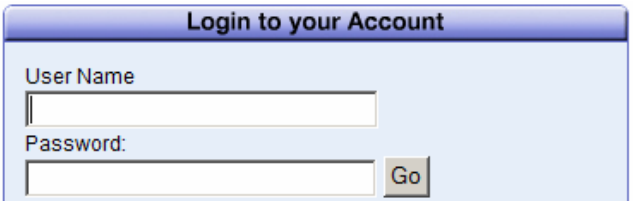
Guest Access Portal

Users who have been provided with a project number and a project specific password may access that project through the Guest Access portal on the PlanWell homepage.

After entering in the required information, you may view the project and potentially begin the order placement process. Details on the project viewing and ordering process have been outlined in detail above under Company Projects.

Note: Although you may view these projects with the project number and password, if you choose to begin the ordering process, the user login window will appear and you will be prompted to enter in your PlanWell user information. It is not necessary however to be a registered user to order through PlanWell. Further information for Non-Registered users is documented later in this manual.

Login to your Account

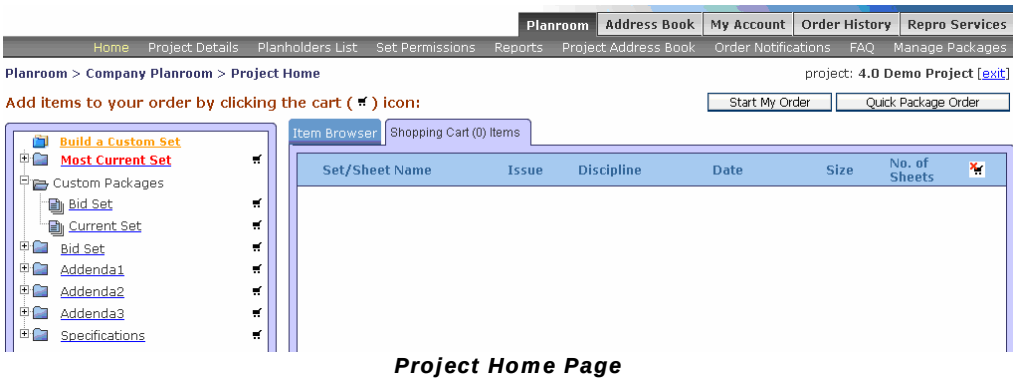


All authorized company planroom users should have received a username and password. Please enter this information into the appropriate fields and select [Go].

All projects within your company planroom will be listed. You may narrow down the list of projects you view by placing a checkbox in the box next to the projects you use most frequently and selecting [add to favorites]. After your favorites list has been created, choose [show my favorites] to only view this listing.

Enter a specific project by first clicking on the project name. You will then be prompted to enter the project-specific password. This will bring you into the project homepage where you may view project documents and begin the ordering process.

Populating Shopping Cart

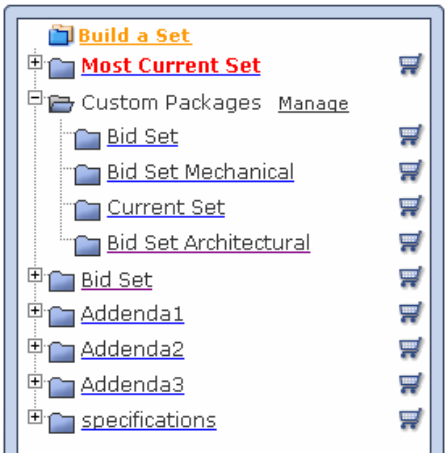


Project Home Page

As shown in the above example, documents for viewing and ordering may be selected in a number of different ways.

Note: Depending on your specific user permissions, item selection options may vary. This document will discuss all options potentially available.

Build a Custom Set – By selecting this option you will have the ability to build a set based on your desired criteria. You may build a set based on date, discipline and/or issue. Within the specified criteria, you may build a Current Set or a Historical Set. A current set will return the most current drawings for the criteria specified; a historical set will return every drawing matching the criteria that was issued previous to the date chosen. All documents will list under the item browser window as illustrated below.



Item Browser | Shopping Cart (0) Items

Path: Most Current Set As of 6/3/2004 13:47:00Central

Sheet No.	Issue	Issue Date	Discipline	Size	Type	Description
A-101	Addenda3	2/25/2004	Architectural	30X42	B&W	-
A-103	Addenda3	2/25/2004	Architectural	30X42	B&W	-
A-104	Addenda3	2/25/2004	Architectural	30X42	B&W	-
A-105	Addenda3	2/25/2004	Architectural	30X42	B&W	-
A-106	Addenda3	2/25/2004	Architectural	30X42	B&W	-
A-107	Addenda3	2/25/2004	Architectural	30X42	B&W	-

Item Browser Window Example

Most Current Set – By selecting this option, the most current drawings will populate into the Item Browser window. By clicking on the plus sign [+] next to [Most Current Set], the tree will expand to show each discipline. By selecting a discipline under Most Current Set, the Item Browser window will list all current drawings for the selected discipline.

Custom Packages – Custom packages are bundles or groups of documents available for ordering. By selecting the name of a pre-created package, all documents included in that package will be listed in the Item Browser window. Although you may view these documents individually, you may only order complete packages.

Depending upon your user permissions, you may have the ability to manage packages as necessary. This process is outlined in detail in a later section.

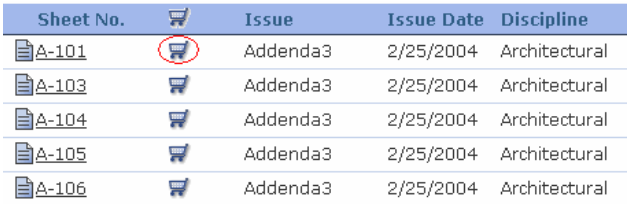
Issue Tree – In our example above, our issue tree contains issues labeled Bid Set, Addenda1, Addenda2, Addenda3 and Specifications. When viewing documents in the issue tree, you may select either the name of the issue, or by clicking on the [+]

next to the issue, you may select a specific discipline within that issue. All documents within your selection will be listed in the Item Browser window.

In all cases, thumbnails images of any document in the Item Browser window may be viewed by clicking on the item name.

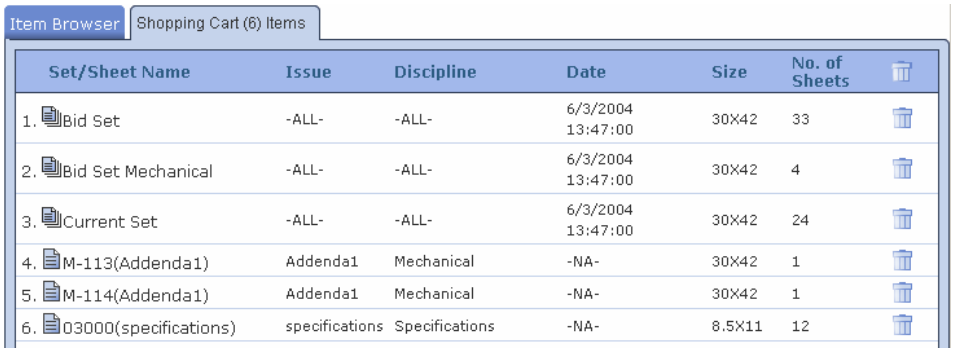
Documents can be added to your cart by selecting the cart icon next to the desired item. As you add items to your cart, the [Shopping Cart (0) Items] will be adjusted to show the number of items currently in your cart. To add an entire set or package to your cart, select the shopping cart icon next to the set. To add an individual item, select the shopping cart icon next to the sheet name.

Add Set



Add Individual Items

When you have completed the document selection process, click on the [Shopping Cart Items] tab to view all items currently in your cart.



Shopping Cart View

Throughout the order process you may remove items from your order by selecting the remove from cart icon.

Placing a Standard Order in PlanWell

The order process is a four step process. To begin the first of these four steps, select [Start My Order].

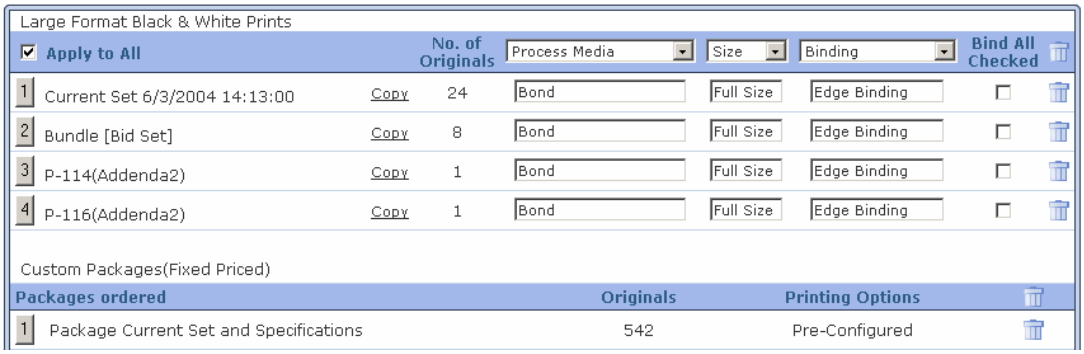
Note: Throughout the order process you will find "breadcrumbs" showing where you currently are and providing you with both a step forward and a step backward.

Step 1: Print Options

Along the left column will be standard information necessary for billing. Based on your login information, "Ordered By", "Job Name" and "Charge To" will be pre-

populated. If necessary, you may add a job number, P.O. number and special instructions for the order.

You will now be required to specify the printing details for all documents and sets you are ordering.


Large Format Black & White Prints
Apply to All
No. of Originals
Process Media
Size
Binding
Bind All Checked
1 Current Set 6/3/2004 14:13:00 Copy 24 Bond Full Size Edge Binding
2 Bundle [Bid Set] Copy 8 Bond Full Size Edge Binding
3 P-114(Addenda2) Copy 1 Bond Full Size Edge Binding
4 P-116(Addenda2) Copy 1 Bond Full Size Edge Binding
Custom Packages(Fixed Priced)
Packages ordered
Originals
Printing Options
1 Package Current Set and Specifications 542 Pre-Configured

Print Options

Process Media / Size / Binding – The dropdown arrow will allow you to select the appropriate options for each of these fields for each item being ordered. Default information may pre-populate these fields although this default information may be changed as necessary.

When making changes, it is important to note that by default, your selected changes will apply to all items being ordered. To change just one line item, click on the number next to the item and make the desired selections.

Bind All Checked – This option will bind together any selected items. As items are selected, the field surrounding these items will turn yellow and the bind option will only be available for the first item.

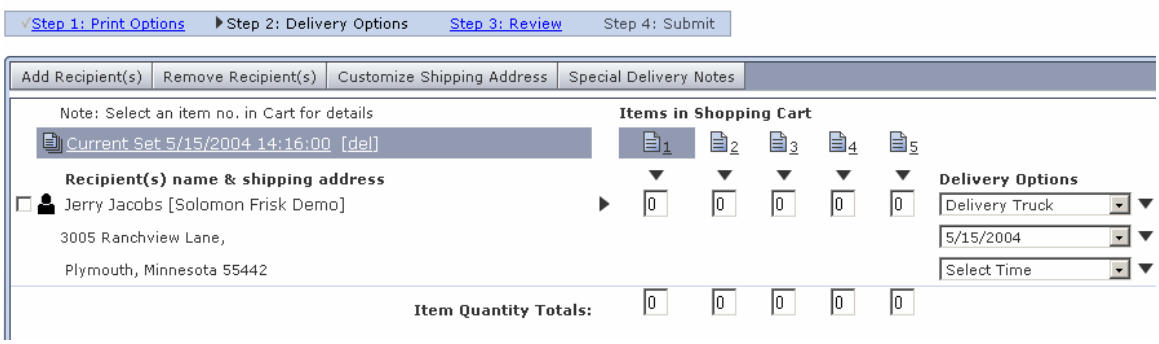
Copy – Occasionally you may wish to order the same item more than once using different printing options (i.e.: one a full size, the other at half size). This may be done by selecting [Copy] in the appropriate item line. You may now select your printing options for the copied items as is done for all other items.

Print options for custom packages may be configured the same as for all other items unless listed under “Custom Packages (Fixed Price)”. A fixed price custom package has had all print options preconfigured and therefore this information cannot be changed. Custom packages will be discussed in greater detail later in this document.

When all print options are set, please select [Next] to move to step two of the order process.

Step 2: Delivery Options

PlanWell allows you to set the quantities and distribution of your order through a simple matrix that operates very much like a spreadsheet.



Delivery Options Window

Recipients will be listed down the left column, shopping cart items along the center and delivery options along the right. Transmittal information may be determined from options listed at the bottom of the window (not shown in illustration).

Recipient Information

PlanWell allows for easy distribution of documents to additional recipients. Four options are available for the management of this process.

Add Recipients – This option will bring you into an address book window where you may begin the process of selecting recipients.

Search for Users
First Name
Last Name
Company
Trade
ALL
00010 - Architect
00110 - Marketing
01000 - Dilos Trade
Search in
All Users
Employee only
Contact only
Status
Active
Date Created Between
From
To
search
reset
Order > Delivery Options > Select Recipients
Please select existing user(s) to add recipient(s) to current order.
Master Address Book Users
Master Address Book Groups
Project Address Book
Planholders List
add selected user(s) as current order recipients
create new employee
create new contact
Contact CDW Tom Hagerty -
Contact Concrete Barriers Ben Lind 01000 - GENERAL REQUIREMENTS 01020 - ALLOWANCES 01080 - IDENTIFICATION SYSTEMS
Contact Concrete Barriers Joe Jackson -
Contact Concrete Barriers Mark Cline -
Contact Concrete Barriers Steve Johnson -
Contact Cutting Edge Dominic Roads 01000 - GENERAL REQUIREMENTS 01010 - SUMMARY OF WORK 01050 - FIELD ENGINEERING
Contact Cutting Edge karitest 00110 - Marketing
Contact Digital Steel Dave Digital -

Using the tabs along the top of this window, you may select recipients from the four address book options. You may also use the search features along the left column to find a specific user more quickly.

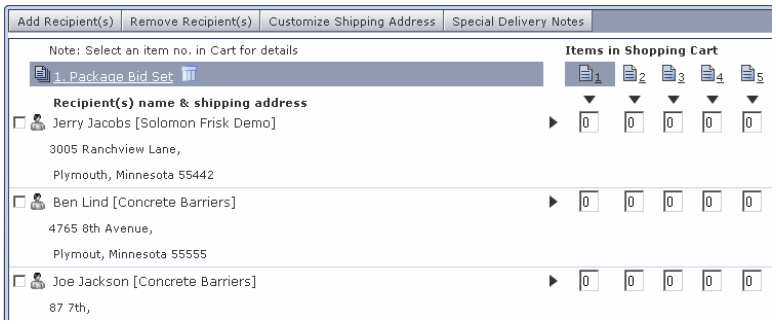
Master Address Book Users – This list will contain all employees and contacts in your address book. In addition to their name and company name, you will also be able to view any trade information assigned to them. Creation of the master address book is discussed later in this document.

Master Address Book Groups – Groups are logical organizations of users from the master address book. For example, you may choose to create a group of all users in a specific trade or within a specific company. Creation of groups is discussed later in this document.

Project Address Book – The Project Address Book contains all users from your master address book who you have determined have an interest in this project. While the master address book and groups are available for all projects, the project address book is project specific. Creation of the project address book is discussed later in this document.

Planholders List – The Planholders list is a listing of any user who has received documents for this project. If you provide someone with the project number and password and they order documents, they will be added to the Planholders list even though they may not be in your master or project address books. While all other address book options discussed are created by you or your reprographer for you, the Planholders list is dynamically maintained as orders are placed in PlanWell.

After locating your desired recipient(s), choose [add selected user(s) as current order recipients]. All recipients will now be listed in the main Delivery Options window.

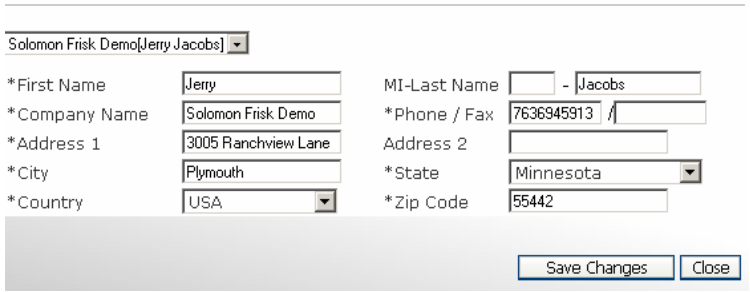


Recipients in the Main Delivery Options Window Example

Remove Recipients – Selected recipients may be removed from the order distribution by first selecting the box next to their name, then selecting [Remove Recipients].

Customize Shipping Address – If the order delivery address needs to be edited, select the box next to the recipient's name and select [Customize Shipping Address].

Once you have edited the information, select [Save Changes]. It is important to note that changes made are temporary only. Permanently editing recipient information will be discussed later in this document.



Customized Shipping Address Example

Special Delivery Notes – For each recipient, customized information may be added by first selecting the box next to the recipient(s) and choosing [Special Delivery Notes]. Custom text made be entered and saved for that specific recipient.

Items in Shopping Cart

Once all recipient information has been entered, you may select the desired quantities of each item for each recipient.

Each item in the shopping cart has been assigned a number. To view the details you may either hover over the item number or you may click on the item number. After clicking on the number, you will find the details regarding it listed to the left.

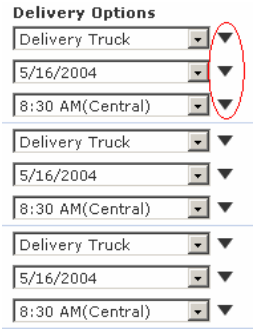
You may remove items from the order by clicking on the garbage can in the item description.

Quantities for each item may be assigned either universally (such as one set of "Current Set" for each recipient), individually or through a combination of both methods. To set a universal quantity, type in the number in the quantity box and use the 'apply over' arrow or 'apply down' arrow to assign to all users.

Individual quantities may be assigned by simply typing in the quantity in the appropriate box. Although you may have utilized the universal quantity tools, you may override any of these settings by simply typing in the correct amount.

Delivery Options

As with items in the shopping cart, delivery options may be assigned universally, individually or a combination of both. Select a delivery method, due date and due time. You may apply this information universally by utilizing the 'apply down' arrows.



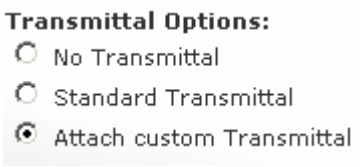
Note: Each field has its own drop down arrow therefore applying information universally requires 3 different 'apply down' arrow clicks.

Transmittal Options

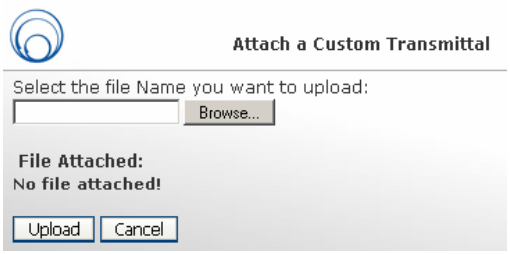
The final step on the Delivery Options window is to specify transmittal options. You may select "No Transmittal", "Standard Transmittal" or "Attach Custom Transmittal".

By selecting “Standard Transmittal”, you will have additional options to customize text in the transmittal. This may be done by selecting the desired recipients, typing in the customized text and choosing [Save]

By selecting to attach a custom transmittal, you will be brought to a dialog box which will allow you to browse to the location of the desired transmittal.



Transmittal Options



Attach Custom Transmittal Dialog

When all required information has been completed, you may proceed with your order by selecting [Next].

Step 3: Review

The review window will allow you to see all details of the order. Where available, you may also see a price quote for all items ordered. If desired, you may remove items from your cart by selecting the delete from cart icon. As you remove items, the price quote listed will be adjusted to reflect the correct pricing for all remaining items.

Once you have carefully reviewed the order, you may finish the order process by selecting [Submit Order]

Step 4: Submit

You will be informed of your successful order submission on this final order processing window. You will be provided with an order number and will have the opportunity to print the distribution, print the complete order or return to the project home.

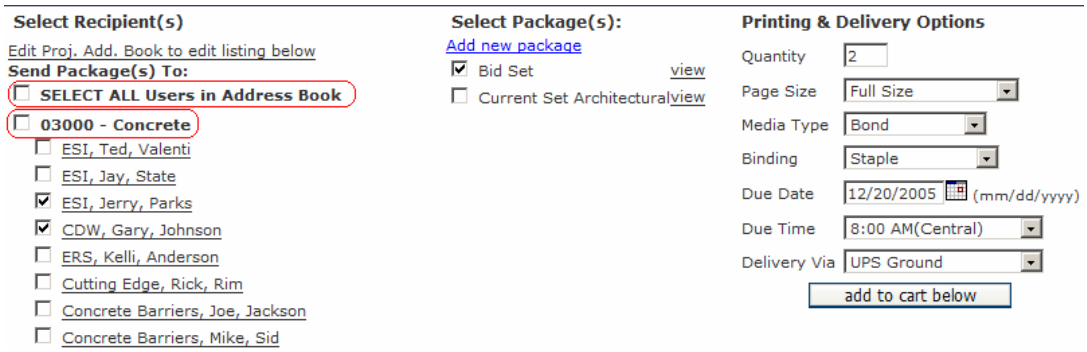
Quick Package Order

For any user wishing to simply order packages, you may have the ability to bypass the standard 4 step order process and use the Quick Package ordering feature. The quick package order feature allows for fast and easy ordering of custom packages.

Note: Based on your user login and project specific information, this feature may not be available to you for every project.

When available, the [Quick Package Order] button will be located next to the [Start My Order] button on the project home page.

Since this feature only works with custom packages, it is not necessary to select documents from the main page. Begin your order by simply selecting [Quick Package Order].



Quick Package Order Window

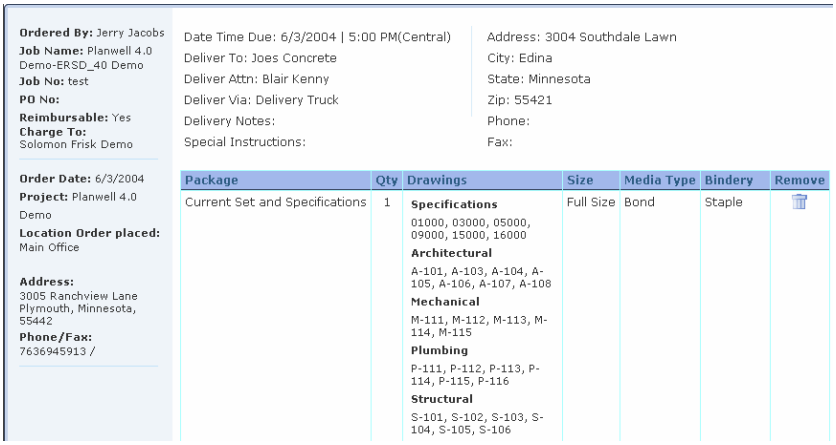
The quick package order feature is as simple as matching up users to packages and then assigning print and delivery options.

Begin by checking the box next to the recipient(s) name. Recipients may be selected individually or as a group by choosing either the Category above the names to the "Select All Users in Address Book" option

Next check the box next to the package(s) you wish that recipient(s) to receive. Enter in Printing and Delivery information and select [add to cart below]. All details of this portion of the order will be listed in the Items in Cart window.

You may continue to match up users to packages until all desired information has been entered. Printing information may be different for each portion of the order however the due date, due time and delivery method must remain the same. Be sure to select [add to cart below] between each selection.

When all selections have been made, select [Next]. This will allow you to review all details of the order. You may remove one portion of the order by selecting the remove from cart icon. This will remove the selected package from that specific recipient only.



Quick Package Order Review Window

Submit the order by selecting [Submit Order]. You will be provided with all details of the order along with the order number. You will also have the opportunity to print this final details page.

Digital Download

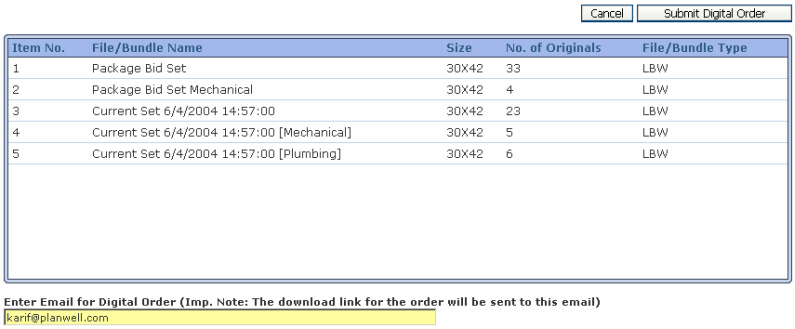
For any user wishing to download documents digitally, the digital download feature will allow you to do this.

Note: Based on your user login and project specific information, this feature may not be available to you for every project.

When available, the [Digital Download] button will be located next to the [Start My Order] or [Quick Package Order] buttons on the project home page.

Begin this process by populating your shopping cart as outlined above. Once all items are included, simply select [Digital Download].

Verify all details of the order on the following page. To properly receive information regarding this digital download, verify that your correct email address is listed in the bottom column.


Cancel
Submit Digital Order
Item No. File/Bundle Name Size No. of Originals File/Bundle Type
1 Package Bid Set 30X42 33 LBW
2 Package Bid Set Mechanical 30X42 4 LBW
3 Current Set 6/4/2004 14:57:00 30X42 23 LBW
4 Current Set 6/4/2004 14:57:00 [Mechanical] 30X42 5 LBW
5 Current Set 6/4/2004 14:57:00 [Plumbing] 30X42 6 LBW
Enter Email for Digital Order (Imp. Note: The download link for the order will be sent to this email)
karif@planwell.com

Digital Download Review Screen Example

Once all information is verified, select [Submit Digital Order]. You will receive a confirmation of the digital order placement on the following screen.

Once your request is processed within the Reprographic shop, you will receive an email with instructions for accessing the digital files.

Note: This feature may not be available at all Reprographic locations

Additional Planwell Features

Along the top of the company planroom are tabs for additional project management features. When you select any of these features, the available options for that feature are listed. It is again important to note that these features may or may not be available to all users for all projects.

Planroom

Project Details

In addition to basic project details such as name, number and project description, when defined, this option will also provide you with Web Post Date, Bid Due Date, Issue Date and Project Phase/Version.

Bid Info

This option contains either typed bid instructions or links to bid instruction documents. Your PlanWell provider will populate this option with the information you provide.

Planholders List

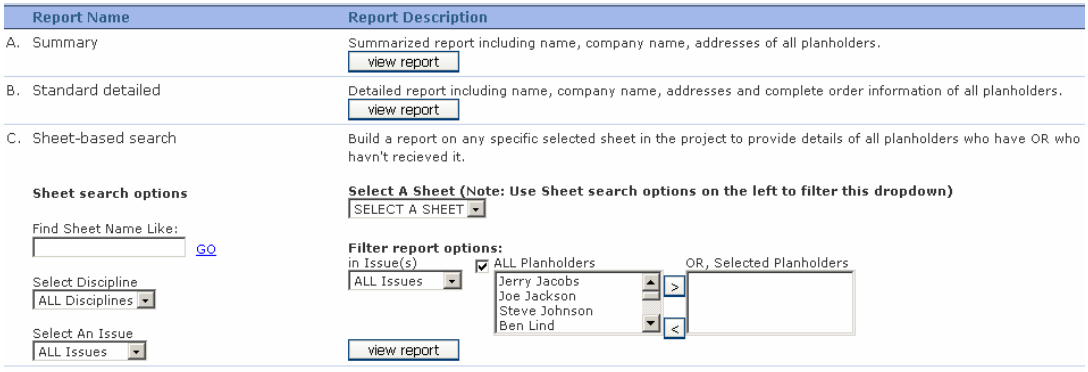
The Planholders List option will allow you to create real-time reports on all project activity. As discussed previously, a planholder is anyone who has received project documents. The report options you are presented with may vary from the below list. If you are interested in a report that is not available to you online, contact your PlanWell provider.

Option A will provide a summary of all Project Planholders. This information will include each Planholders name, company name and contact information.

Option B will provide the same information as Option A but will also include order details for each planholder. These order details will include order number, order date, items order and who placed the order.

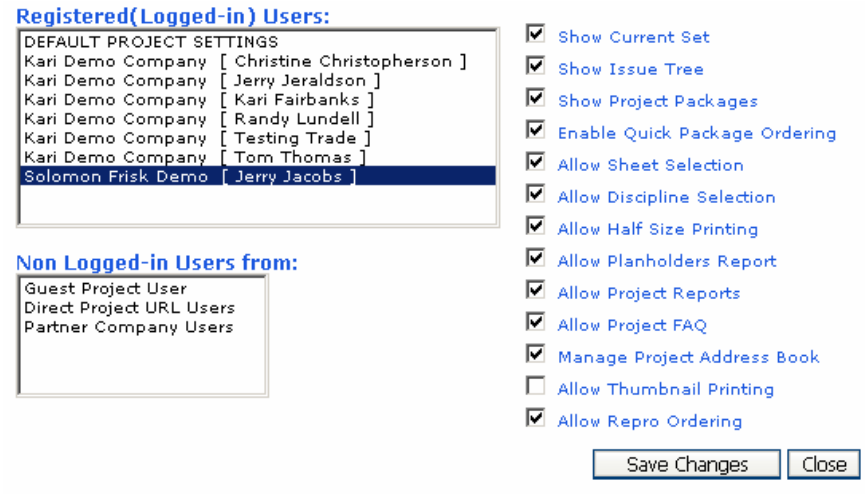
Option C allows you to view who has received a specific sheet, discipline or issue. For example, if you would like to know if "Ben Lind" received sheet "A-101" from "Addenda 1", Option C will allow you to generate this information.

Option D allows your reprographer to provide customized PlanHolder information as a project attachment. By selecting the attachment name, you will be able to view this attachment.


Report Name
Report Description
A. Summary
Summarized report including name, company name, addresses of all planholders.
view report
B. Standard detailed
Detailed report including name, company name, addresses and complete order information of all planholders.
view report
C. Sheet-based search
Build a report on any specific selected sheet in the project to provide details of all planholders who have OR who havn't recieved it.
Sheet search options
Select A Sheet (Note: Use Sheet search options on the left to filter this dropdown)
SELECT A SHEET
Find Sheet Name Like:
GO
Filter report options:
in Issue(s)
ALL Planholders
OR, Selected Planholders
ALL Issues
Jerry Jacobs
Joe Jackson
Steve Johnson
Ben Lind
Select Discipline
ALL Disciplines
Select An Issue
ALL Issues
view report
D. Custom Plan Holders List Files
Custom planholders list files manually maintained & uploaded by your reprographer:
Attached File1:

Planholders List Window

Project Settings (shown online as “Proj. Settings”)
As mentioned throughout this document, based on log on information and project specific settings, some users may see all possible options while others do not. These settings are created in the Project Settings feature.


Registered(Logged-in) Users:
DEFAULT PROJECT SETTINGS
Kari Demo Company [Christine Christopherson]
Kari Demo Company [Jerry Jeraldson]
Kari Demo Company [Kari Fairbanks]
Kari Demo Company [Randy Lundell]
Kari Demo Company [Testing Trade]
Kari Demo Company [Tom Thomas]
Solomon Frisk Demo [Jerry Jacobs]
Non Logged-in Users from:
Guest Project User
Direct Project URL Users
Partner Company Users
Show Current Set
Show Issue Tree
Show Project Packages
Enable Quick Package Ordering
Allow Sheet Selection
Allow Discipline Selection
Allow Half Size Printing
Allow Planholders Report
Allow Project Reports
Allow Project FAQ
Manage Project Address Book
Allow Thumbnail Printing
Allow Repro Ordering
Save Changes
Close

Project Settings Example

When choosing [Project Settings], you will have a listing of individual employees, groups categories for address book contacts and non-registered users as well as a listing of permissions you are able to assign.

Begin this process by highlighting DEFAULT PROJECT SETTINGS under “Registered (Logged-in) Users”. Next set the specific permissions for the default users by placing check boxes in the options you would like to have available. All employees, contacts and non-registered users, unless assigned permissions differently, will follow these settings. Once complete, choose [Save Changes].

For any specific user who you wish to have different permissions, highlight the name and assign the desired permissions.

You may also assign permissions based on contact or non-registered user groups. Each group listed under “Non Logged-In Users from” is defined in the Project Settings window (definitions not shown in example). If you do not set specific permissions for any of these groups, they will follow the default projects settings.

> **Note:** The permissions that you are allowed to set may vary from the list in the above example.

Reports
Project specific document information can be generated by selecting [Reports]. Begin by specifying your desired criteria and then selecting either [Current Set] or [Historical Set]. You will be provided with a report listing all files meeting the criteria you specified. The resulting report may be printed or exported for future use.

Project Address Book (Shown online as “Proj. Add. Book”)

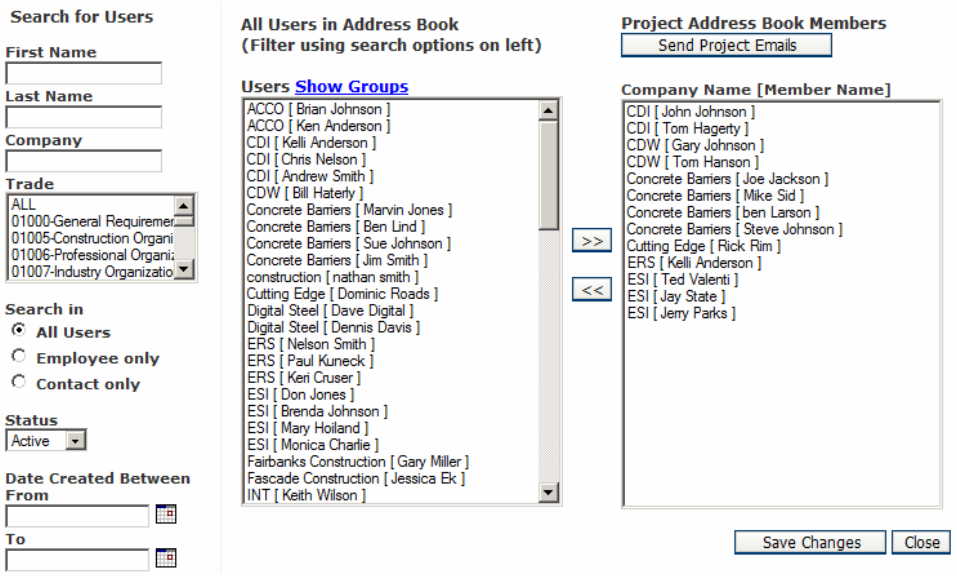
Previously in this document we discussed the definition and purpose of the Project Address Book. This option allows for the creation of this project address book.

When first selecting this option, you will see a column for all users in your master address book and another column for users in your project address book.

You may add users to the project address book by selecting the name in the master address book and clicking on the [>>] button. You may use the search options along the left to narrow down the list of users shown in your master address book or choose "Show Groups" to view any pre-created groups.

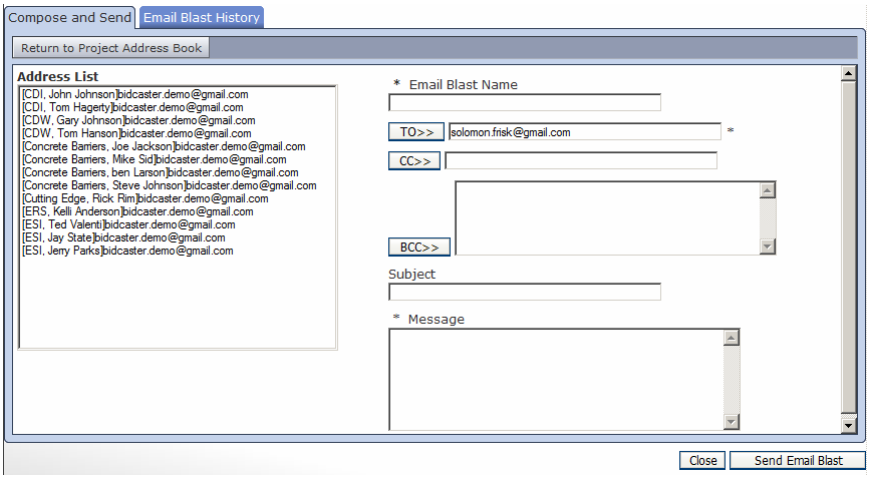
You may also choose to remove users from the project address book by selecting the name in the project address book list and clicking on the [<<] button.

Note: Removing a user from the project address book will not remove their order history or Planholders information.


Search for Users
First Name
Last Name
Company
Trade
ALL
01000-General Requiremer
01005-Construction Organi
01006-Professional Organi
01007-Industry Organizatio
Search in
All Users
Employee only
Contact only
Status
Active
Date Created Between
From
To
All Users in Address Book
(Filter using search options on left)
Users Show Groups
ACCO [Brian Johnson]
ACCO [Ken Anderson]
CDI [Kelli Anderson]
CDI [Chris Nelson]
CDI [Andrew Smith]
CDW [Bill Haterly]
Concrete Barriers [Marvin Jones]
Concrete Barriers [Ben Lind]
Concrete Barriers [Sue Johnson]
Concrete Barriers [Jim Smith]
construction [nathan smith]
Cutting Edge [Dominic Roads]
Digital Steel [Dave Digital]
Digital Steel [Dennis Davis]
ERS [Nelson Smith]
ERS [Paul Kuneck]
ERS [Keri Cruser]
ESI [Don Jones]
ESI [Brenda Johnson]
ESI [Mary Hoiland]
ESI [Monica Charlie]
Fairbanks Construction [Gary Miller]
Fascade Construction [Jessica Ek]
INT [Keith Wilson]
>>
<<
Project Address Book Members
Send Project Emails
Company Name [Member Name]
CDI [John Johnson]
CDI [Tom Hagerty]
CDW [Gary Johnson]
CDW [Tom Hanson]
Concrete Barriers [Joe Jackson]
Concrete Barriers [Mike Sid]
Concrete Barriers [ben Larson]
Concrete Barriers [Steve Johnson]
Cutting Edge [Rick Rim]
ERS [Kelli Anderson]
ESI [Ted Valenti]
ESI [Jay State]
ESI [Jerry Parks]
Save Changes
Close

Project Address Book

Within the Project Address Book is the option to "Send Project Emails". By selecting this option, you will be able to build and send an email to any recipient in your project address book.



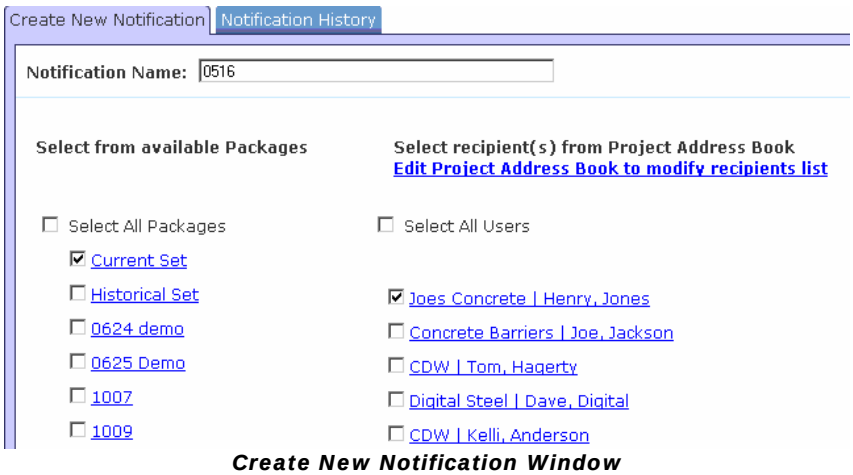
Send Project Email Option

Select recipients from the Address list and click on the [TO>>], [CC>>] or [BCC>>] box to move the recipient to that specific area. Type in an Email Blast Name, your email subject, message and choose "Send Email Blast".

At any time, you may view any previously sent emails by clicking on the [Email Blast History] tab.

Package Notifications

Via email, you may send out package notifications to any user in your project address book by selecting the "Package Notifications" option.



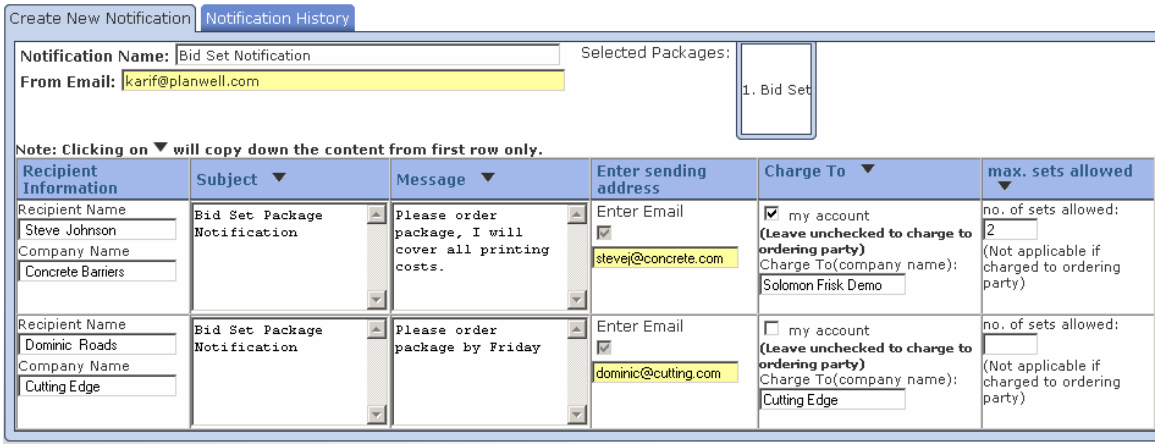
Create New Notification Window

Begin this process by defining a notification name. You may wish to refer back to this notification at a later date so please name this clearly.

Select which package(s) you wish to alert the recipient(s) of. You may also use the "Select All Packages" option. Next, select who you wish to be the recipient(s) of this email. Again, you may use the "Select All Users" option. Proceed to the next step by selecting [Next].

Continue the notification process by specifying a subject and message for the email. By utilizing the apply down icon ▼, you may apply this information to all recipients. You may also type in specific information for each recipient.

The power of this option comes in indicating if you would like to pay for these packages for any specific email recipient. As the note indicates, if this option is unchecked the ordering party will be responsible for all printing costs. Depending on your selection, the "Charge To" details will populate. Finally specify the maximum number of sets you are allowing the recipient to order.



Notification Details Window

Once all desired information is completed, you may select [Send Notification] to send the message. You will automatically be brought to a window where you will see all details regarding the notification. By selecting on the View option you will be able to see a copy of the message which has been sent.

You may also see a list of all notifications previously sent by selecting [Notification History]. By clicking on the notification name, you will be able to view the details of that notification, including who may have ordered the packages through this notification.

> **Note:** The recipient of this email has been provided with a link directly into the PlanWell order process where they will simply need to specify printing and delivery options and select [Submit Order]. In the cases where you have indicated that you will be paying for the order, the link will only work until an order is placed using it. Once an order is placed, any further attempts to use the link will fail with the message to contact you.

FAQ

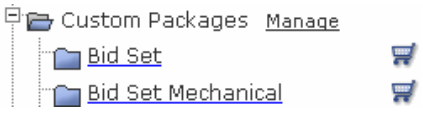
Planwell allows for users to post questions into a FAQ area. For each project, you may elect specific employees to receive an email notification whenever a question is posted; please provide this name to your PlanWell provider for inclusion. This allows for easy access into this area to respond to the posted question.

To post a new question, users will begin by selecting a category and then choose [Post New Message].

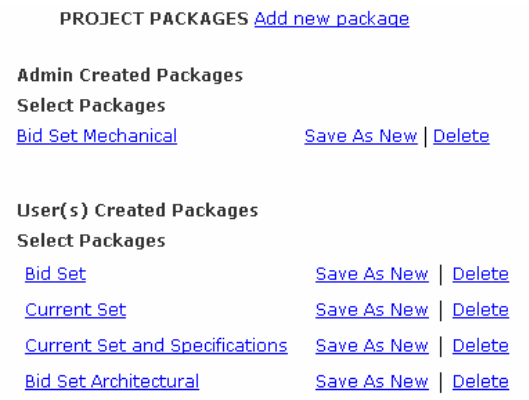
To reply to a message, the appropriate employee will select the category, select the question and choose [Reply to Message].

Manage Custom Package Option

With the appropriate user permissions, you may manage the packages listed in one of two ways.



You may enter the manage packages window by either selecting the "manage" link next to the packages list or by using the [Manage Packages] button along the toolbar.


PROJECT PACKAGES Add new package
Admin Created Packages
Select Packages
Bid Set Mechanical Save As New | Delete
User(s) Created Packages
Select Packages
Bid Set Save As New | Delete
Current Set Save As New | Delete
Current Set and Specifications Save As New | Delete
Bid Set Architectural Save As New | Delete

Manage Packages Window

Add New Package

The Add New Package option allows you to create new packages which will be available for immediate and future ordering.

After selecting Add New Package, you will need to begin by choosing a Package Name. Be sure to use a name which will easily describe the contents of this new package.

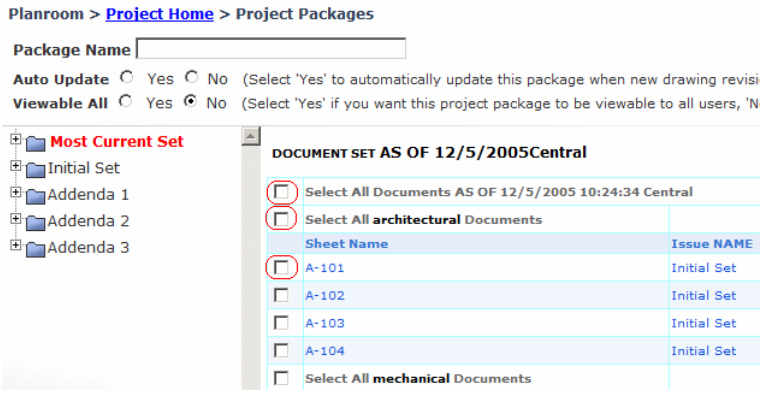
Next you need to make some decisions regarding this package. The first question you need to indicate yes or no to is "Select 'Yes' to automatically update this package when new drawing revisions become available". By selecting "Yes" to this, you are indicating that all documents you add into this package will always remain current. In my example below, if I select yes for this option and then add drawing A-101 to this package, whenever a new revision for drawing A-101 becomes available, this package will be updated removing the old drawing A-101 and replacing it with the new revision.

The next question you will need to answer yes or no to is "Select 'Yes' if you want this project package to be viewable to the users". By choosing "Yes" for this option, you will be allowing any user who has the ability to view packages to both view this new package and place orders on it. Choose "No" if you would like this package to only be available for you to view and order.

You will now need to add files to this package. By default, the files selected when you first open this option are a full current set. You may change this by using the Build a Set, Most Current Set and issue tree along the left column.

All resulting documents will be listed in the right View Documents column. You may choose to add all listed documents, all documents from a particular discipline or individual documents to your package by putting checks in the appropriate boxes.

Once you have selected all desired documents, choose [Create Package]. This package will now be added to the list of available packages.


Planroom > Project Home > Project Packages
Package Name
Auto Update Yes No (Select 'Yes' to automatically update this package when new drawing revisi
Viewable All Yes No (Select 'Yes' if you want this project package to be viewable to all users, 'N
Most Current Set
Initial Set
Addenda 1
Addenda 2
Addenda 3
DOCUMENT SET AS OF 12/5/2005Central
Select All Documents AS OF 12/5/2005 10:24:34 Central
Select All architectural Documents
Sheet Name
Issue NAME
A-101
Initial Set
A-102
Initial Set
A-103
Initial Set
A-104
Initial Set
Select All mechanical Documents

Add New Package Window

Note: As mentioned at the start of this section, viewing and ordering packages may not be available to all users for all projects. Project permissions will be discussed later in this document.

Save As New

The "Save As New" option is similar to the "Add New Package" option however the "Save As New" option will allow you to use an existing package as a template in the creation of a new package.

Select the "Save As New" option next to the package you wish to use as a template. Specify a new name for this package, indicate if it is to automatically update or not and if it is to be viewable to users or not.

All documents from the original package will be listed in the view documents column. By default, all of these documents are selected. You may keep the same documents or add and remove documents following the same procedures in the "Add New Package" option.

Once the package contains all desired documents, choose [Save as a New Package]. This package will now be added to the list of available packages.

Note: The original package you selected for use as a template has remained untouched and will still be available for ordering.

Delete

Obsolete packages may be deleted by selecting "Delete". This change is immediate.

Address Book

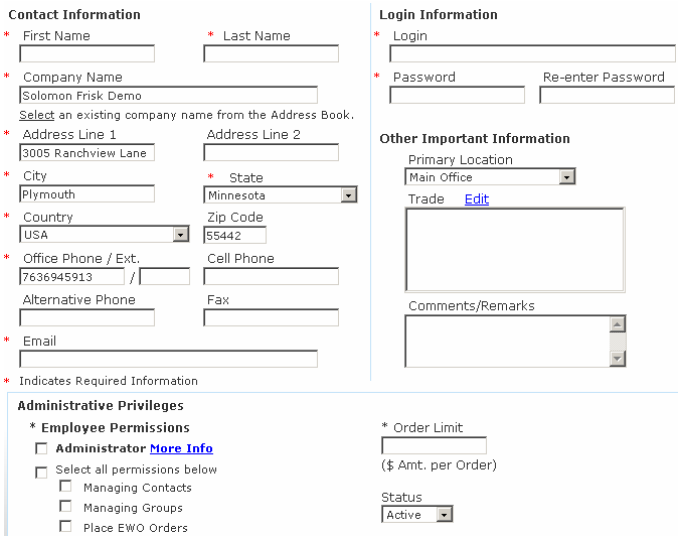
When selecting the address book tab, you will see your complete address book. From this list, you may choose to view the details of any user by putting a check in

the box next to their name and choosing [View User Details]. You may also delete a specific user by again placing a check in the box next to their name and choosing [Delete User(s)]. *To maintain the integrity of all projects, users who are on any project Planholders list may only be deleted with the assistance of your PlanWell provider.*

From within this Users view, you may also choose to add additional employees or contacts to your address book.

Add Employee

After selecting [Add Employee], you will need to enter in all information regarding this new employee including login information, permissions and their order dollar limit.

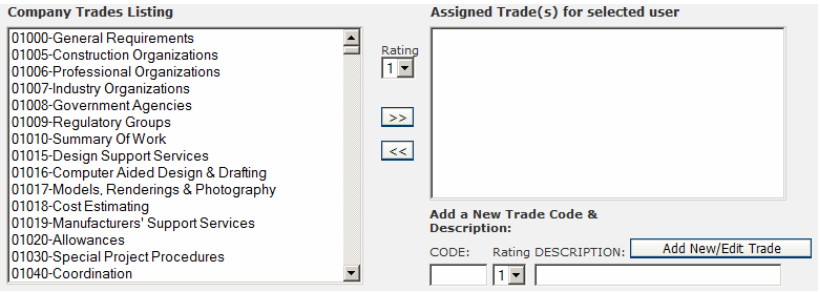


Add Employee Window

Note: Be careful when assigning the order limit as the employee will not be able to complete any orders exceeding that amount.

By selecting “Edit” next to “Trade”, you will have the opportunity to add specific trade information to this employee. Additionally, you may add ratings for each specified trade. As ratings of 1 through 5 can be assigned, it is recommended that you define each of these ratings appropriately for your company.

Highlight the appropriate trade, specify a rating of 1 through 5 and choose [>>] to add the trade to the “Assigned Trade(s) for selected user” column. You may assign as many trades as appropriate; each with a different rating if necessary. By accurately assigning this information, you will be able to fully utilize the search functionality throughout PlanWell.



Assigning Trade Window

If necessary, you may also create additional trade codes and descriptions. This process is completed by indicating a unique trade code and description and choosing [Add New/Edit Trade].

Choose [Save Changes] to save all trade information

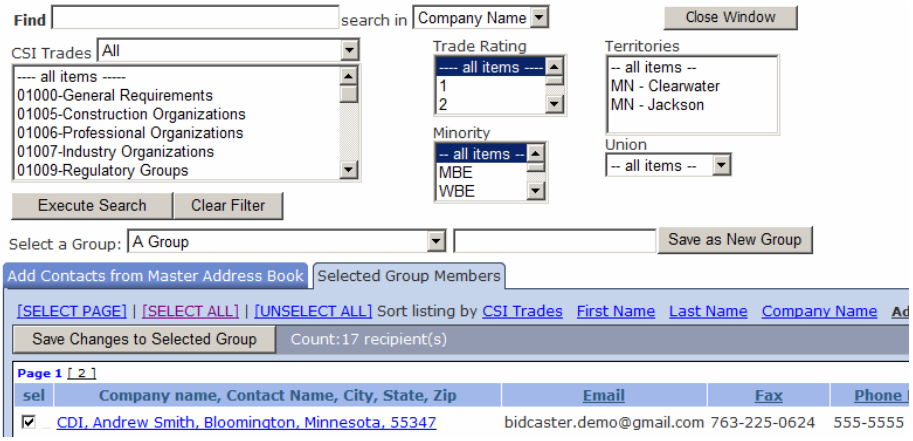
Select [Save Changes] from the "Add Employee" window to add this new employee into the PlanWell system. This new account will become active within 24 hours; please contact your PlanWell provider if access to this account is necessary more quickly.

Add Contact

To add an additional contact, choose the [Add Contact] button. You will be brought to a window very similar to the Add Employee window however you will not be asked to specify login information, permissions or order dollar limits. Again, be sure to accurately assign trade information.

Manage Groups

By choosing [Manage Groups] you will be brought into a detailed address book search window. From within this window you may select an existing group to edit or build a new group by narrowing down the master address book through the available search criteria. After finding all desired group participants, name the group and choose [Save as new Group]. If editing an existing group, you may save your group membership changes by choosing [Save Changes to Selected Group].



Manage Groups Window

In addition to the options listed, the Address Book tab includes additional address book management features.

Import Contacts
Although we have just discussed how to add an individual employee or contact to your address book, if you wish to add multiple users you may do this quickly and easily through the Import Contact feature.

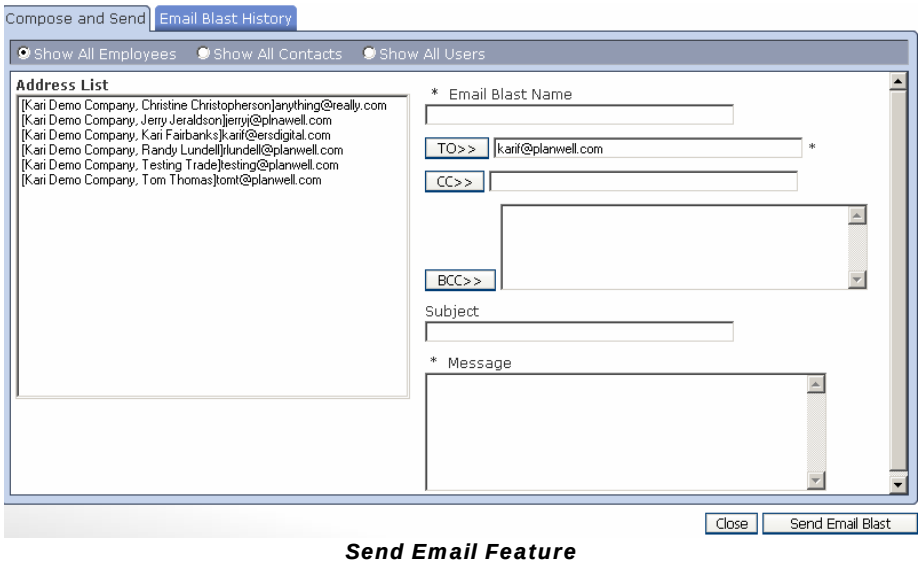
After selecting [Import Contacts], you will need to specify the program you will be importing from and browse to the location of the file containing your contact information. Next, please indicate if a column header is present and how you would like to handle duplicate records. Choose [Next] to continue the import process.

The Match Address Book Fields window will allow you to match the fields within your document to fields PlanWell requires. Once these matches are made, select [Next] to complete the import process.

If desired, you may also utilize PlanWell's import templates to complete the import process. By choosing "Click here to download a Standard PlanWell template file along with help instructions", you will be provided with all tools necessary to format your address book file and upload the resulting file into PlanWell.

Export Contacts
Occasionally you may wish to export your address book for review. This can be accomplished by selecting [Export Contacts]. This opens a standard download window where you may select to download your entire address book or any desired group. After making this selection, choose [Export] and indicate a location to save this file to; you may access this file once the download is complete.

Send Email
This feature will allow you to send an email to users in your address book. Begin this process by selecting [Send Email].



Send Email Feature

Begin by defining an Email Blast Name. Be sure to name this clearly as you may choose to view details of this message at a later date.

Choose the appropriate option for “Show All Employees”, “Show All Contacts” or “Show All Users”. From the resulting address list, choose the recipients for this email by highlighting the name and then select either the [To>>], [CC>>] or [BCC>>] buttons.

Type in the subject and message and select [Send Email Blast]. This email will now be sent to all recipients.

By choosing the [Email Blast History] tab, you may view or resend this message. When choosing to resend, you may choose additional or different recipients for this message.

User Permissions
When initially adding a new employee to your address book, you were given the opportunity to define permissions for this employee. If necessary, you may choose to edit these permissions at a later time by selecting [User Permissions].

This can be done by highlighting the employee, specifying the appropriate permissions and choosing [Save Changes].

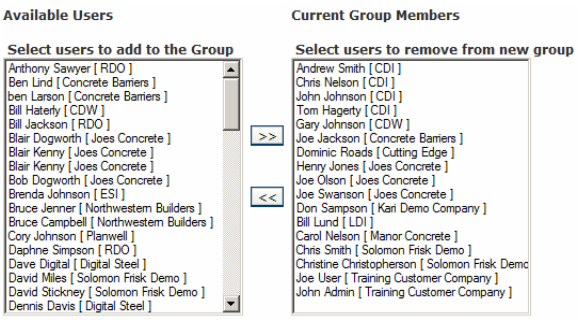
When accessing the address book tab, your initial view is of all users. You may change views from users to groups by selecting the [Groups Listing] tab. Within this window you may view, edit or delete any existing groups.

Group membership may be viewed by clicking on the group name or by placing a check box next to the name and choosing [View Group Details].

Obsolete groups may be deleted by placing a check box next to the name and choosing [Delete Group(s)]. If desired, you may delete multiple groups at one time by selecting all groups prior to making the [Delete Group(s)] selection. Although the group will be deleted, all members of that group will remain in the master address book.

Editing Groups
Group membership may be edited through two functions – Quick Edit and Advanced Edit.

The **Quick Edit** option will allow you to view your master address book and add users to your group by highlighting the user in the “Available Users” column and choosing [>>] to add them to the “Current Group Members” column. Users may be removed from a group by highlighting their name in the “Current Group Members” column and choosing the [<<] button.


Available Users
Current Group Members
Select users to add to the Group
Select users to remove from new group
Anthony Sawyer [RDO]
Ben Lind [Concrete Barriers]
ben Larson [Concrete Barriers]
Bill Haterly [CDW]
Bill Jackson [RDO]
Blair Dogworth [Joes Concrete]
Blair Kenny [Joes Concrete]
Blair Kenny [Joes Concrete]
Bob Dogworth [Joes Concrete]
Brenda Johnson [ESI]
Bruce Jenner [Northwestern Builders]
Bruce Campbell [Northwestern Builders]
Cory Johnson [Planwell]
Daphne Simpson [RDO]
Dave Digital [Digital Steel]
David Miles [Solomon Frisk Demo]
David Stickney [Solomon Frisk Demo]
Dennis Davis [Digital Steel]
>>
<<
Andrew Smith [CDI]
Chris Nelson [CDI]
John Johnson [CDI]
Tom Hagerty [CDI]
Gary Johnson [CDW]
Joe Jackson [Concrete Barriers]
Dominic Roads [Cutting Edge]
Henry Jones [Joes Concrete]
Joe Olson [Joes Concrete]
Joe Swanson [Joes Concrete]
Don Sampson [Kari Demo Company]
Bill Lund [LDI]
Carol Nelson [Manor Concrete]
Chris Smith [Solomon Frisk Demo]
Christine Christopherson [Solomon Frisk Demo
Joe User [Training Customer Company]
John Admin [Training Customer Company]

Quick Edit Option

The **Advanced Edit** option will allow you to utilize the detailed address book and search criteria previously discussed in "Manage Groups".

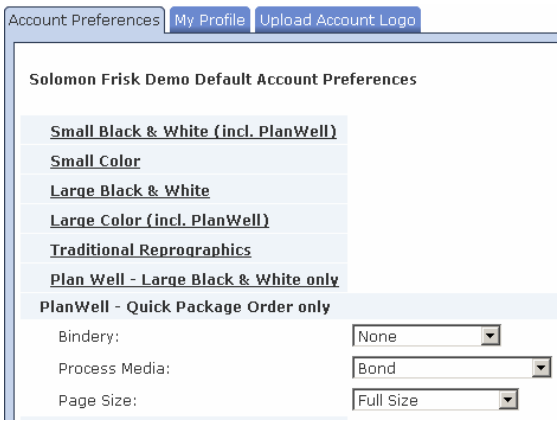
Create New Group (Quick)/Create New Group (Advanced)
You may also choose to create additional groups by selecting either [Create New Group (Quick)] or [Create New Group (Advanced)]. From within this window, enter a group name and add users utilizing either the Quick or Advanced options previously discussed.

My Account

Within the [My Account] feature, you will have the ability set your account default preferences, view your profile information and upload your account logo.

Account Preferences

You may set default online ordering information for every service your reprographer offers through the Account Preferences tab. By selecting the link before the service name, you will be given a list of options which can have defaults assigned to them.



In our example, we selected Planwell – Quick Package Order Only. We now may specify our default printing options for Bindery, Process Media and Page Size. By using the drop down arrows next to each of these categories, we may choose our default from all options available.

Note: These are simply defaults. When ordering you may choose different options.

When all default information has been selected for a specific service, choose [Save Changes]. You may now select the next service and repeat the process.

Note: You must choose [Save Changes] between each service.

My Profile

The [My Profile] tab allows you to view standard user information PlanWell utilizes for your account. By selecting the [Change Profile] option you may change any of your information listed. By selecting [Change Password] you may change your Planwell password.

Upload Account Logo
If you would like to further personalize Planwell, you may add your company logo for all of your projects. This can be accomplished through the [Upload Account Logo] tab.

Simply browse to the location of your logo file and choose [Upload Logo] from the upper right corner.

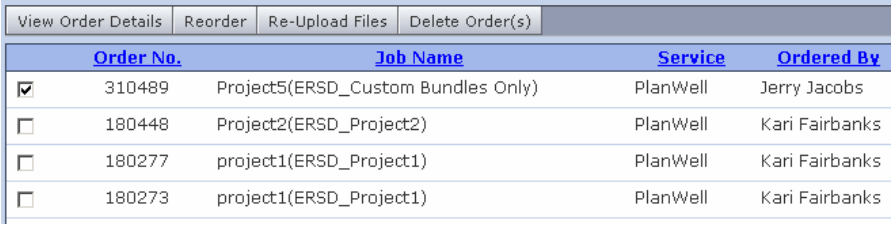
Once a logo has been uploaded, you may either edit or delete that logo by selecting the appropriate option.

Manage Templates
This option is only viewable when accessing PlanWell from a provider who also offers BidCaster. This function will be discussed in detail in the BidCaster section of this document and in the full BidCaster User Manual.

Order History

The order history tab will provide you will information on all previously placed orders. The main screen will provide you with the order number, job name, service, ordered by details, date ordered and the current status within your reprographic shop.

Further options are available by putting a check in the box next to the order, and choosing [View Order Details], [Reorder], [Re-Upload Files], or [Delete Order(s)].



View Order Details
By selecting this option, you will open a window showing all details of this order including billing information, requested delivery due date and time, items ordered, special instructions indicated and distribution details. Further, you will have the ability to print this information for your records.

Reorder
By selecting [Reorder] you will be brought back into the order process with all documents and printing options pre-selected. This option will allow you to print an additional order exactly as the first was printed.

Re-Upload Files
This option is only available for EWO orders and will not be discussed in this document.

Delete Order(s)

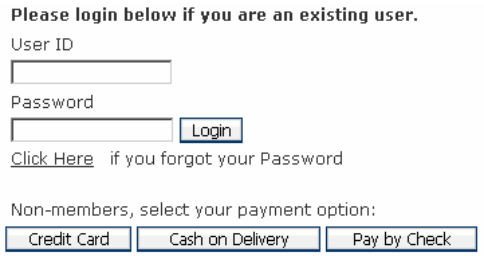
You may find that this order list contains information regarding orders you no longer need to reference. You may remove these orders from the list by selecting [Delete Order(s)].

Note: This simply removes this order from the order history listing. It does not cancel printing on a newly submitted order. Further, this option does not remove references to this order from the Planholders list.

Repro Services and Supplies Tabs
These tabs will only be available if your PlanWell provider offers PlanWell EWO (Electronic Work Order). Details regarding this program are offered in detail later in this document.

Non-Registered Users

As mentioned earlier in this document, users are not required to be a registered PlanWell user to view or order documents online. Once a user begins the order process however, a login prompt will appear and the order cannot continue until information is entered. PlanWell requires this information both for billing and document distribution purposes.

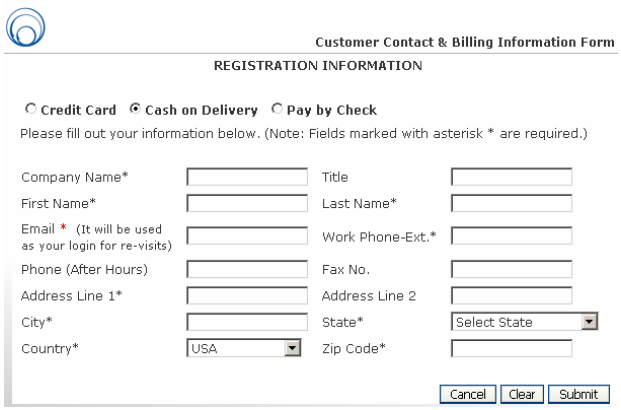


User Login Window

At this prompt, non-registered users may begin by selecting your desired payment option.

Note: Although the above example shows [Credit Card], [Cash on Delivery] and [Pay by Check], you may not see all three of these options listed. Only options the Reprographer offers will be listed.

When you have selected your payment option, you will be prompted to enter in information about yourself, your company and, when appropriate, your payment selection.



Customer Contact and Billing Information Form

Once you have completed all necessary information and selected [Submit] you will be provided with information necessary for any return visits to PlanWell including a username and password. You will have the ability to change your password, print the page for your records or you may select [Continue to Place Order] to continue the order process.

The order process is detailed in the "Company Planroom" section of this document.

PlanWell Enterprise User Manual Conclusion

If you find you have any questions or concerns regarding the information provided in this manual, please contact your PlanWell provider.

In addition to PlanWell Enterprise, your PlanWell provider may offer PlanWell BidCaster and/or PlanWell EWO. All services your PlanWell provider is offering can be easily viewed along the right side of the main PlanWell login page. Your PlanWell Enterprise login username and password will access every PlanWell service your PlanWell provider is offering; it is not necessary to register separately for PlanWell BidCaster or PlanWell EWO.

Detailed user guides for each of these additional PlanWell services are available by clicking on the "user guide" link as shown in the example.

For your convenience, condensed user guides for PlanWell BidCaster and PlanWell EWO have been included in this document.

Example of PlanWell Services

PlanWell BidCaster Quick Start Guide

Overview:

The purpose of this guide is to provide readers with instruction on the basic functions within PlanWell BidCaster. More details of these functions as well as all other facets of the BidCaster program can be found in the full BidCaster user guide. It is recommended that you review the full user manual prior to accessing any BidCaster functionality for the first time and use this Quick Start Guide for any subsequent activity.

Introduction:

With the proper permissions, BidCaster allows you to create new projects as well as send broadcast announcements of existing projects to any user in your address book. A basic understanding of the BidCaster program will allow you to use it's functionality throughout the entire life of your project.

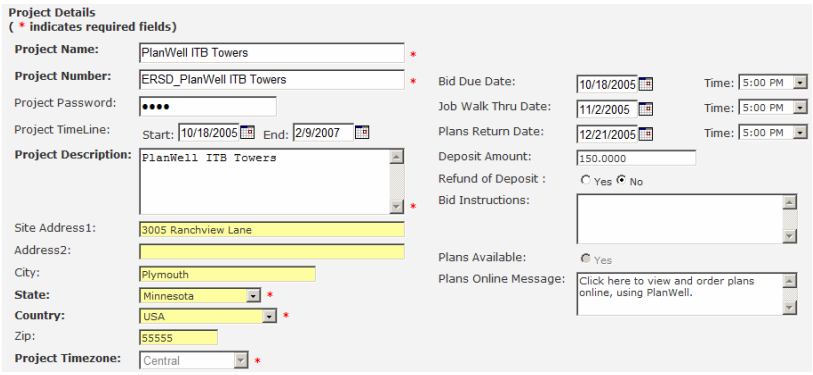
BidCaster Functionality within an Existing Project

BidCaster functionality can be added to any PlanWell Enterprise project by contacting your reprographer. Your reprographer can define which employees of your company can view and complete BidCaster functions for a specific project in PlanWell. Once you have been given these permissions, you may begin by logging into PlanWell and accessing the desired project. You will now find three additional options listed in red in the Planroom menu – Project Details, Start a Broadcast and Broadcast History.

BidCaster Options in Project View

Project Details

Within Project Details you will find all project details used by BidCaster during the broadcast process as well as the text included in all broadcasts regarding the availability of online ordering of this project. These project details can be edited by you as needed.


Project Details
(* indicates required fields)
Project Name: PlanWell ITB Towers
Project Number: ERSD_PlanWell ITB Towers
Project Password: ••••
Project TimeLine: Start: 10/18/2005 End: 2/9/2007
Project Description: PlanWell ITB Towers
Site Address1: 3005 Ranchview Lane
Address2:
City: Plymouth
State: Minnesota
Country: USA
Zip: 55555
Project Timezone: Central
Bid Due Date: 10/18/2005 Time: 5:00 PM
Job Walk Thru Date: 11/2/2005 Time: 5:00 PM
Plans Return Date: 12/21/2005 Time: 5:00 PM
Deposit Amount: 150.0000
Refund of Deposit : Yes No
Bid Instructions:
Plans Available: Yes
Plans Online Message: Click here to view and order plans online, using PlanWell.

Project Details Window

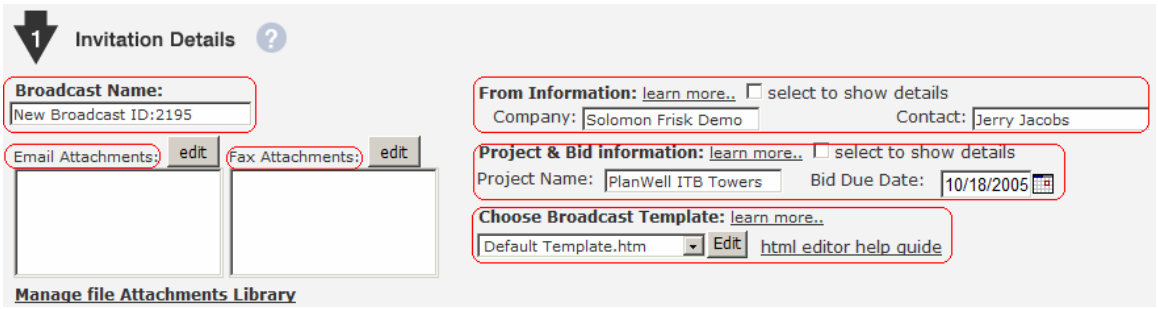
Also within the project details window is a listing of the assigned default templates and any existing project packages. You may change which template you use or, if desired, edit the selected template. This process, as well as an explanation of each template, is discussed in detail in the BidCaster tutorial.

Start a Broadcast

After choosing to start a broadcast, you will be presented with the three 3 broadcast process.

Step One:

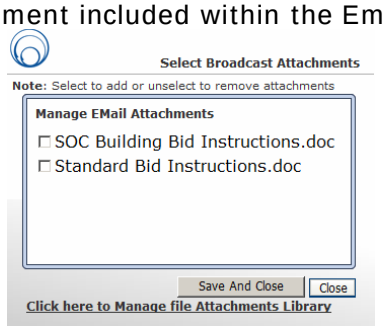
You should begin all broadcasts by defining a broadcast name. Although a name is automatically assigned by BidCaster, you will find it very helpful to change this name to something intuitive and easy to identify.



Step 1

Next you may choose to attach documents to email broadcasts recipients. Although we are using the term "attachment" it is important to be aware that rather than actually attaching a document to the email, we will instead be providing a link to the document in the email. With many email clients blocking or stripping email attachments, this ensures that all email recipients, regardless of their email client, will in fact receive this document.

To attach a document, choose "edit" above 'Email Attachments' to be presented with all documents previously added into BidCaster. To include one or more of these documents in the broadcast, select the box next to the document(s) and choose "add". You will see the document included within the Email Attachment box.


Select Broadcast Attachments
Note: Select to add or unselect to remove attachments
Manage EMail Attachments
SOC Building Bid Instructions.doc
Standard Bid Instructions.doc
Save And Close
Close
Click here to Manage file Attachments Library

Add/Manage Document Library Window

Note: To add or delete the available documents listed, choose "manage document library". To add a new document, choose "browse", browse to the location of your document and choose "open". Choose "upload" to add this document to your document library. To delete a document, place a check in

the box next to the document and choose “delete”. By choosing “save and close” the manage library window will close and you will be presented with your updated list.

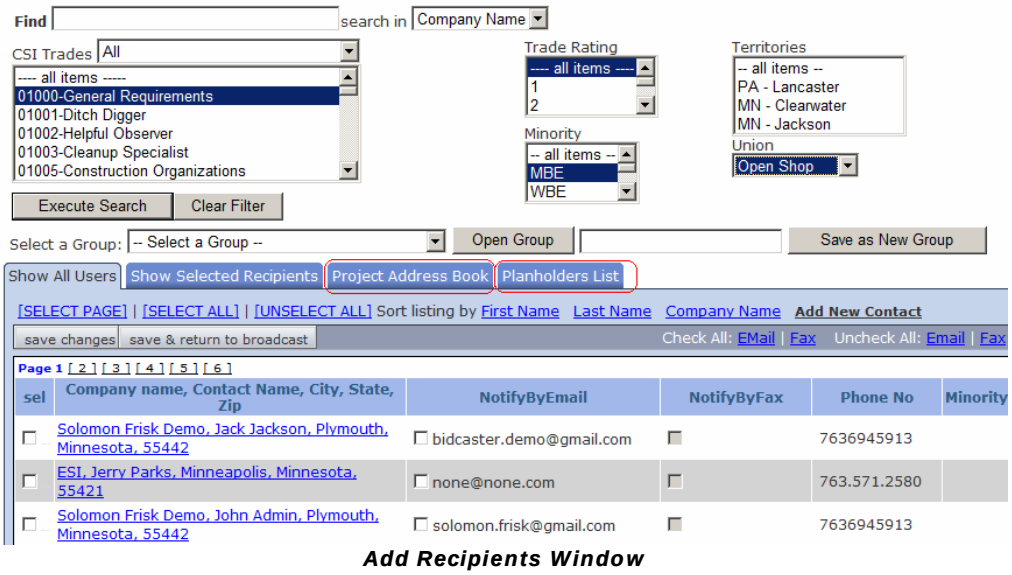
Because you may choose to send different documents to email recipients than you do to fax recipients, you may now choose to repeat the above steps to add a document to a fax recipient.

The ‘From Information’ contains information about you which will be included in the broadcast. This information is populated based on your PlanWell profile. By choosing the box next to “select to show details” you may view and edit if necessary any of the information provided. It is important to note, any changes made are not permanent rather they are for this broadcast only.

The Project Details information lists all of the information we discussed previously under “Project Details”. You may choose the “select to show details” option to view and edit if necessary these details. As with the From Information, changes made are not permanent rather they are for this broadcast only.

The Broadcast Template lists the template which will be used for this specific broadcast. You may change which template you use or, if desired, edit the selected template. This process is discussed in detail in the BidCaster tutorial.

Step Two:
You may add recipients to the broadcast by choosing “Add Recipients” in step two. This will present you with a full listing of all users within your PlanWell master address book. You may narrow down this list by specifying the desired option for the search criteria listed and choosing “execute search”. You may also choose to combine multiple criteria – for example, you may choose “01000 General Requirements” – “WBE” – “No Union” and execute the search for anyone meeting those criteria.



Add Recipients Window

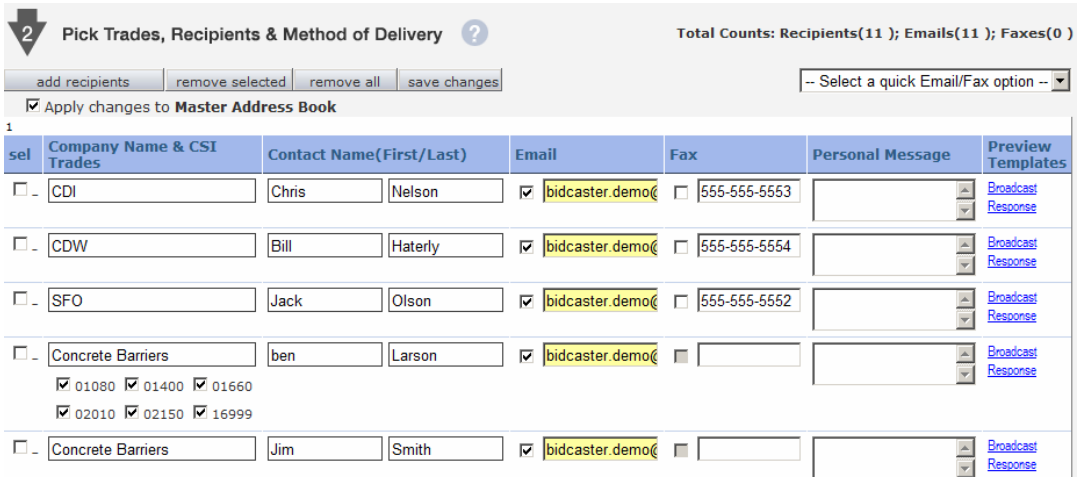
You may also narrow down the address book listing by viewing any pre-created groups. These groups can be found in the ‘Select a Group’ dropdown menu.

Finally, you may find recipients by choosing the Project Address Book or Planholders tabs. The project address book tab will provide you with a listing of all users within your project address book while the Planholders tab will provide you with a listing of everyone who has received any documents for this project.

As you find users you would like to include in the broadcast, you may select the check box next to their name and choose “add recipients”. You may then continue to search for and add recipients until you have a full listing of all recipients you would like to include.

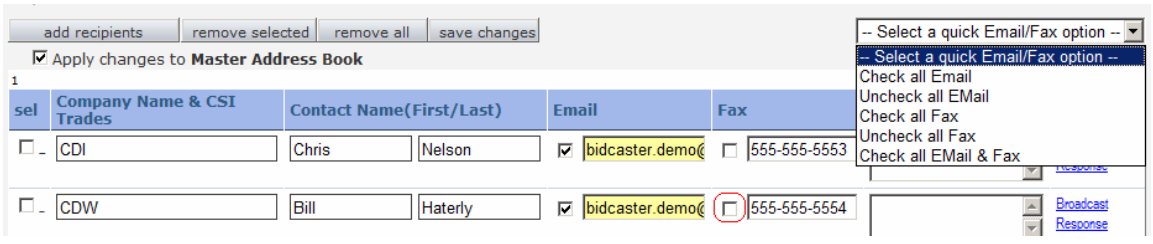
> Note: If, after building your broadcast list, you would like to save this list for future broadcasts, simply type in a group name and choose “Save as a New Group”. This group will now be available for any future broadcasts or for any PlanWell activity.

By choosing “Add Recipient and return to broadcast”, you will be returned to your broadcast with all recipients listed within step two.



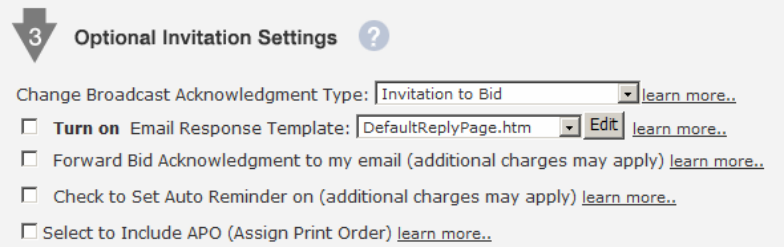
Step 2 Populated

By default, BidCaster will send out all broadcasts via email. You may choose to change this option by using the dropdown menu and choosing “Check all Fax”, “Check all Email and Fax”, “Uncheck all Email”, “Uncheck all Fax”, “Uncheck all Email and Fax”. Additionally, rather than making changes to all recipients, you may choose instead to add or remove check boxes for any individual recipients.



Step three:
Within step three you may choose to define optional BidCaster settings. Please consult your Reprographer prior to making these settings as additional charges may

apply. Additional details regarding these options can be found in the BidCaster tutorial.


3
Optional Invitation Settings
Change Broadcast Acknowledgment Type: Invitation to Bid learn more..
Turn on Email Response Template: DefaultReplyPage.htm Edit learn more..
Forward Bid Acknowledgment to my email (additional charges may apply) learn more..
Check to Set Auto Reminder on (additional charges may apply) learn more..
Select to Include APO (Assign Print Order) learn more..

Step 3 Options

BidCaster allows for two different broadcast acknowledgment types – Invitation to Bid or Information Acknowledgement. Use the dropdown option to change the type.

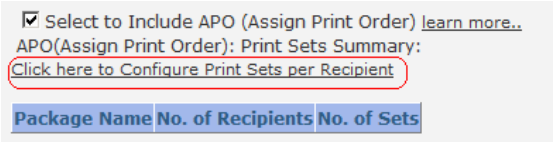
By selecting the "Turn on Email Response Template", you will be adding a second template page to your broadcast. You may edit the template as necessary.

By choosing "Forward Bid Acknowledgements to my email", you will receive all "yes" or "no" bid acknowledgement via email as well as being able to view them in the Broadcast Status Report (discussed later in this document). It is important to remember that you will only receive acknowledgements from those recipients who received the broadcast via email.

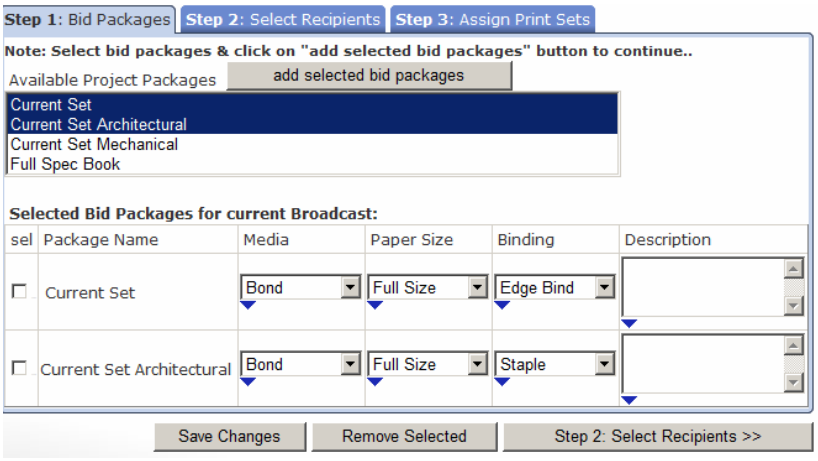
The "Check to Set Auto Reminder On" option allows you to specify a date and time in which an automatic email and/or fax reminder will be sent to any broadcast recipients who have not yet responded to your broadcast. Broadcast recipients who have responded will not be included in this reminder message.

The "Select to Include APO (Assign Print Order)" option allows you to build an order which will automatically be placed for any broadcast recipients who indicate "yes" to your broadcast.

After selecting the box next to this option, you will be presented with the option to configure the print sets per recipient.

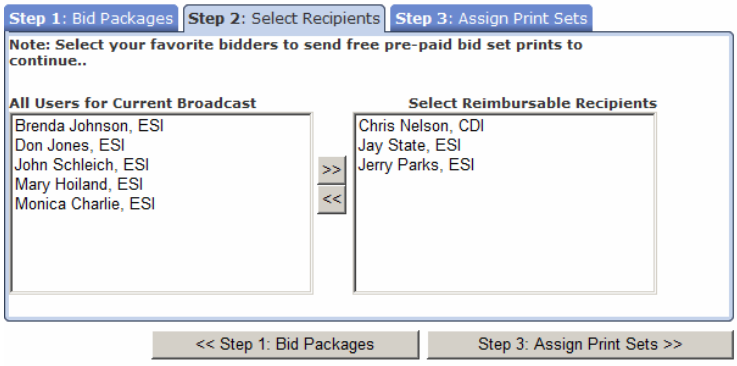

Select to Include APO (Assign Print Order) learn more..
APO(Assign Print Order): Print Sets Summary:
Click here to Configure Print Sets per Recipient
Package Name
No. of Recipients
No. of Sets

After selecting this option, you will be taken through three steps. Step 1 allows you to select from all available packages which package(s) you would like to build the order for. Highlight the package(s) and choose "add selected bid packages"

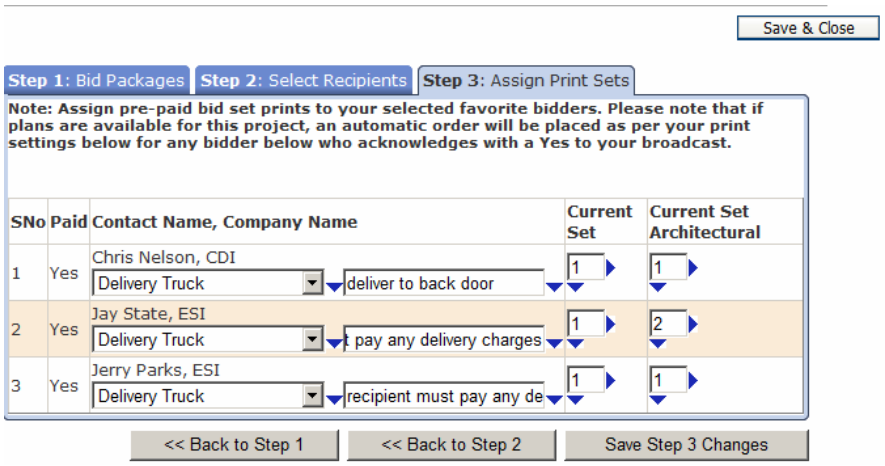


Once added, you will configure the printing options for each package selected and choose “Step 2: Select Recipients”

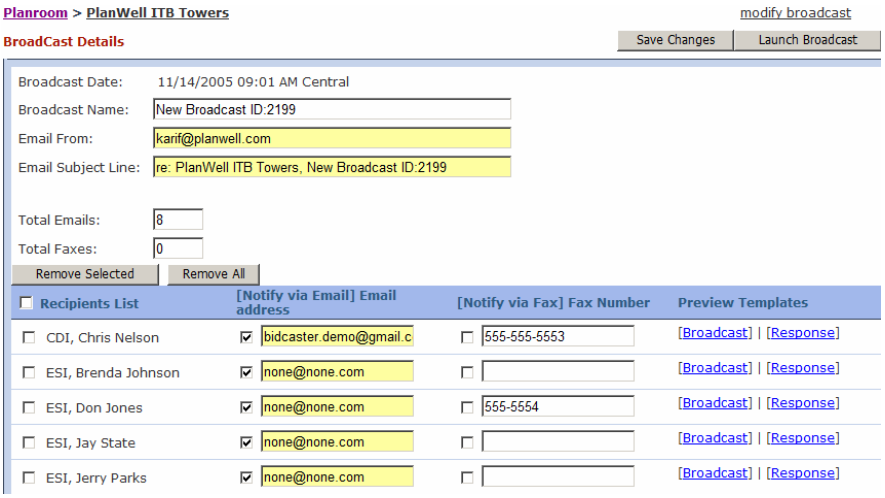
Step 2 will present you with a full listing of all broadcast recipients. Select those recipients who you would like to include in this order and “move” them to the “Select Reimbursable Recipients” box by using the >> button. Choose “Step 3: Assign Print Sets” to continue.



On Step 3, you will specify the delivery method, any delivery instructions and the quantities for each recipient and each package. By choosing “Save and Close” you will save the APO and continue with your broadcast.



After making any optional selections within step 3, choose “review and submit” to continue. The review and submit screen allows you to see a summary of your broadcast and make any last minute changes. Choose “Launch Broadcast” to immediately send your broadcast. If desired, you may also choose “Save Changes” to save your broadcast for a future launch or “Modify Broadcast” to return to the 3 step broadcast window.



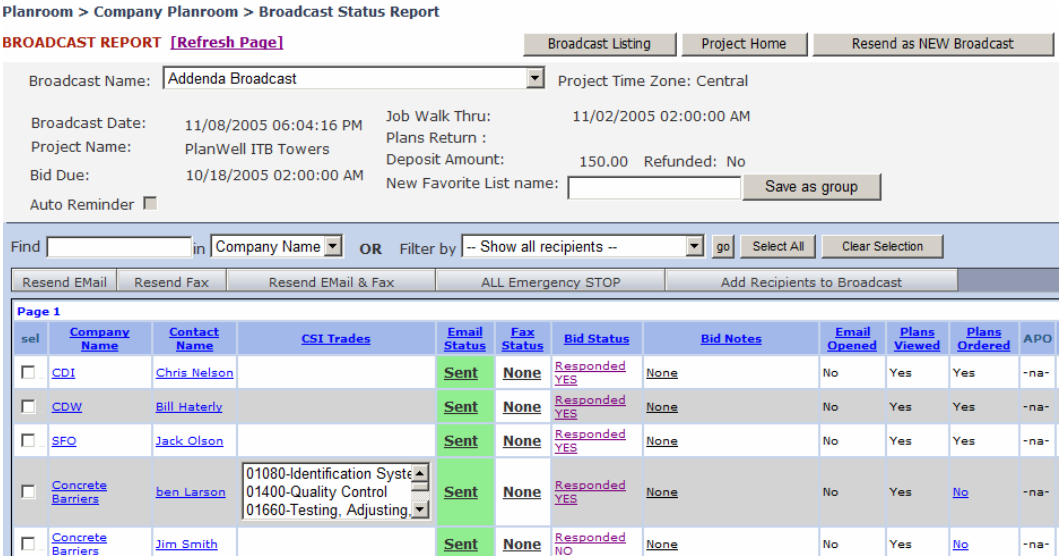
Broadcast History

Every time the “Start a Broadcast” option is selected, a history of that new broadcast is started and maintained throughout its lifecycle. The Broadcast History option allows you to view this history for all complete and incomplete broadcasts.

Completed Broadcast

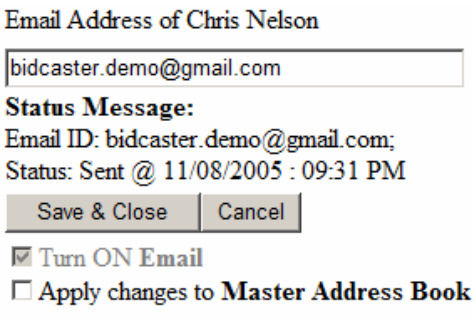
For any broadcast started and launched, BidCaster tracks not only the broadcast details (i.e.: day and time sent) but also any broadcast recipient activity originated from the email broadcast (i.e.: plans viewed, plans ordered, etc). By intuitively naming your broadcasts, you are able to easily identify the broadcast you would like to view activity for and access that specific broadcast by clicking on the broadcast name in the Broadcast History option.

After selecting the broadcast name, you will be brought into the Broadcast Status Report where you are able to view all details.

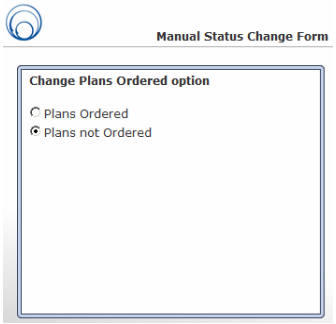


Broadcast Status Report

By clicking on any underlined field you may view additional details. Additionally, by clicking on the bid status, plans viewed or plans ordered options, you may manually set these selections for fax broadcast recipients or any other recipient unable to act on the cues in the broadcast.



Example: Additional Details



Example: Manually Changing Information

Within the broadcast status report you may also choose “Add Recipients to Broadcast” to include additional recipients to this broadcast. After selecting this option, by choosing “Add New Recipients” you will be presented with your Master Address book and will have the ability to select additional broadcast recipients in the same manner listed above.

By choosing “Send Broadcast for Selected Users”, the broadcast will be submitted to the additional recipients. These recipients will be found at the bottom of the broadcast status report.

Also within the broadcast status report is the "Resend as New Broadcast" option. By selecting this option, you will be brought into the 3 step broadcast process with all details populated from the original broadcast. You may name this new broadcast, make any changes as necessary and resend the broadcast.

Incomplete Broadcast

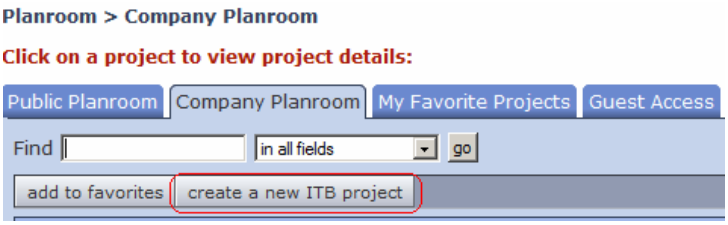
Any broadcast started but not yet launched can be found in the Incomplete Broadcast tab. Again, by intuitively naming all broadcasts, you are easily able to identify each broadcast listed. By selecting the broadcast name you are brought into the 3 step broadcast with any saved information populated. You may now simply finish and launch the broadcast.

Any broadcasts you do not wish to complete can be removed from the incomplete broadcast list by placing a check in the box next to the name and choosing "Delete Selected Broadcast Drafts".

Create a New ITB Project

As mentioned during the introduction to this document, BidCaster not only allows you to send broadcasts but also to create new ITB projects. Until the time in which your Reprographer adds high resolution files to this project, this is considered a "Virtual Project" and can only be used for BidCaster activity.

When your Reprographer gives your company permission to create new projects, any administrator within your company will see the option "Create a New ITB Project".



Create ITB Option

After selecting this option, you will be brought into the Project Details where you will need to indicate all required project information. This information will be included in all BidCaster broadcasts as well as be provided to the Reprographer at the point in time that you choose to add high resolution files to this project.

After typing in the information and choosing "Create New Project", you will be presented with additional Broadcast Setting options. The Manage ITB Templates option allows you to change which template you use or, if desired, edit the selected template.

Also within the Broadcast Settings is the option "Manage Bid Packages". By choosing Add Package, you may add a virtual package to this project by typing in the required information and choosing "Save Changes & Close".

After all details and additional project settings are completed, you may choose "Save Project Changes" to save the information or "Start a New Broadcast" to save the changes and begin the 3 step broadcast process outlined above.

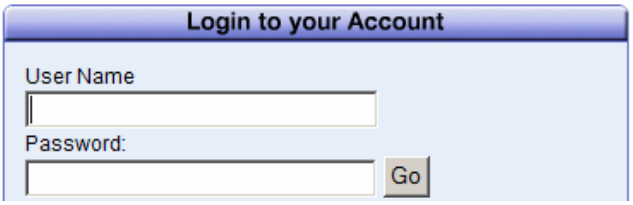
Conclusion:

This concludes the BidCaster Quick Start Guide. As mentioned throughout this document, details regarding each facet of the BidCaster program can be found in the BidCaster Tutorial. It is recommended that you review the tutorial prior to accessing any BidCaster functionality for the first time and use this Quick Start Guide for any subsequent activity.

PlanWell EWO Quick Start Guide

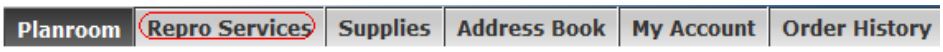
The PlanWell EWO service is simple to use, and its e-commerce functions are likely to be familiar, especially if you use PlanWell. You don't need any special tools or software to use it; just make sure your Web browser is current (Microsoft Internet Explorer v.5.5 or higher; or Netscape v.6.0 or higher).

You can access PlanWell EWO by entering your username and password in the "Login to Your Account" option. This is the same username and password as you use for PlanWell Enterprise or PlanWell BidCaster activity.



It is important to note that although ordering through PlanWell Enterprise can be completed by a non-registered user, EWO activity can only be completed by a registered user. Please contact your reprographer if you do not yet have an account.

After successfully logging in, you must begin the EWO process by choosing the "Repro Services" tab.



Ordering Through EWO

The order process is a four step process. Step 1 begins after selecting "Repro Services"

Note: Throughout the order process you will find "breadcrumbs" showing where you currently are and providing you with both a step forward and a step backward.

Step 1: Print Options

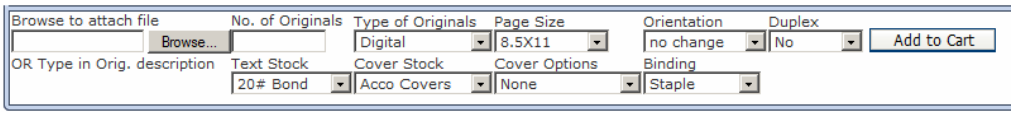
Begin your ordering process by selecting which service you are ordering from the dropdown menu at the top of the page. Please note that the services list may vary from that which is shown in the below example.

Service Selection Example

In the Order Pane below the service, you have two ways to add files to your order. If you would like to upload digital files with this order, please browse to the location of the digital file. It is important to note that you may only add one file or one .zip

bundle at a time. We will discuss how to upload multiple files in the "Uploading multiple Files" section below.

The second method for adding a document to the order is to simply type in the name or description of your hard copy originals.



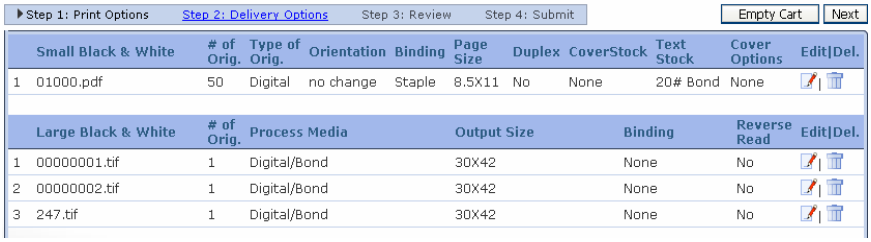
Adding Items to Cart Example

Next, specify the production options for this item. Based on your login information, default printing options may have populated; these default options can be accepted or changed.

Choose [Add to Cart] to add the item to your order.

You may now continue on by choosing another document and/or service to add to your order. You may add as many documents and services to an order as you wish. For example, in the below sample we have added both small format black and white and large format black and white items to our cart.

As you complete the document selection process, the shopping cart will clearly list all items currently in your cart.



Shopping Cart View

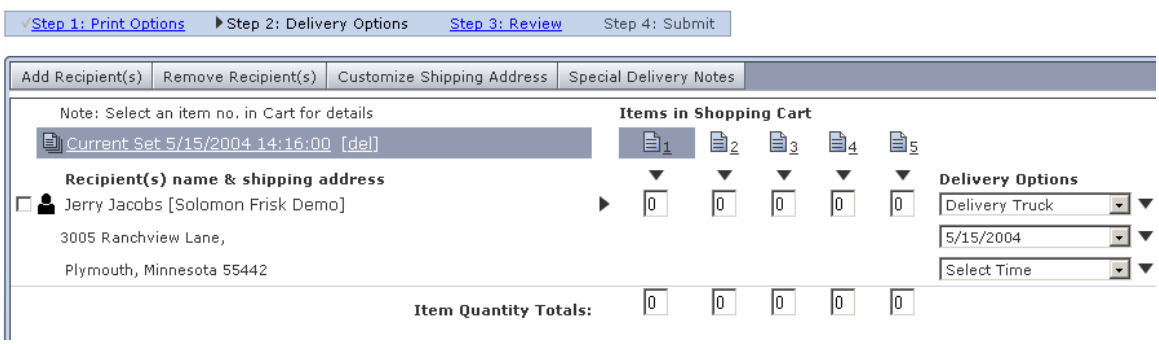
Throughout the order process you may edit or remove items from your order by selecting either the edit icon or the remove from cart icon . You may also choose to completely empty your cart by selecting the [Empty Cart] button.

When the cart contains all items you wish to include in this order, choose [Next] to continue the order process.

Note: If you have indicated that you require a Job Name, Job Number or PO Number on orders, you will need to indicate this information before continuing.

Step 2: Delivery Options

EWO allows you to set the quantities and distribution of your order through the same processes listed in the PlanWell Enterprise section of this document.



Delivery Options Window

Recipients will be listed down the left column, shopping cart items along the center and delivery options along the right. Transmittal information may be determined from options listed at the bottom of the window (not shown in illustration).

Recipient Information

EWO allows for easy distribution of documents to additional recipients. Four options are available for the management of this process.

Add Recipients – This option will bring you into an address book window where you may begin the process of selecting recipients.

Search for Users
First Name
Last Name
Company
Trade
Search in
All Users
Employee only
Contact only
Status
Date Created Between
From
To
search
reset
Order > Delivery Options > Select Recipients
Please select existing user(s) to add recipient(s) to current order.
Master Address Book Users
Master Address Book Groups
add selected user(s) as current order recipients
create new employee
create new contact
Contact CDW Tom Hagerty -
Contact Concrete Barriers Ben Lind 01000 - GENERAL REQUIREMENTS 01020 - ALLOWANCES 01080 - IDENTIFICATION SYSTEMS
Contact Concrete Barriers Joe Jackson -
Contact Concrete Barriers Mark Cline -
Contact Concrete Barriers Steve Johnson -
Contact Cutting Edge Dominic Roads 01000 - GENERAL REQUIREMENTS 01010 - SUMMARY OF WORK 01050 - FIELD ENGINEERING
Contact Cutting Edge karitest 00110 - Marketing
Contact Digital Steel Dave Digital -

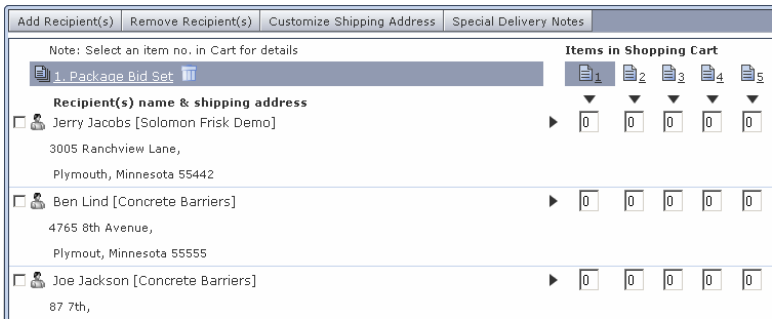
Add Recipients Example

Using the tabs along the top of this window, you may select recipients from the four address book options. You may also use the search features along the left column to find a specific user more quickly.

Master Address Book Users – This list will contain all employees and contacts in your address book. In addition to their name and company name, you will also be able to view any trade information assigned to them.

Master Address Book Groups – Groups are logical organizations of users from the master address book. For example, you may choose to create a group of all users in a specific trade or within a specific company.

After locating your desired recipient(s), choose [add selected user(s) as current order recipients]. All recipients will now be listed in the main Delivery Options window.

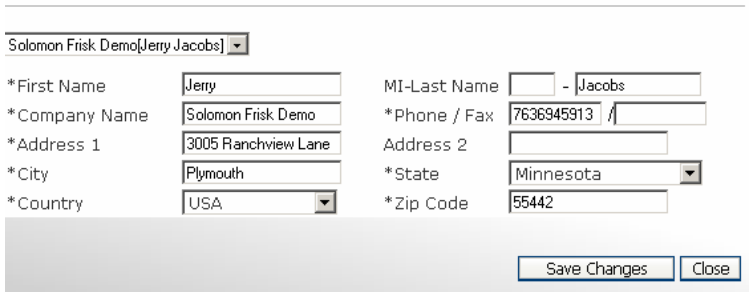


Recipients in the Main Delivery Options Window Example

Remove Recipients – Selected recipients may be removed from the order distribution by first selecting the box next to their name, then selecting [Remove Recipients].

Customize Shipping Address – If the order delivery address needs to be edited, select the box next to the recipient's name and select [Customize Shipping Address].

Once you have edited the information, select [Save Changes]. It is important to note that changes made are temporary only.



Customized Shipping Address Example

Special Delivery Notes – For each recipient, customized information may be added by first selecting the box next to the recipient(s) and choosing [Special Delivery Notes]. Custom text made be entered and saved for that specific recipient.

Items in Shopping Cart

Once all recipient information has been entered, you may select the desired quantities of each item for each recipient.

Each item in the shopping cart has been assigned a number. To view the details you may either hover over the item number or you may click on the item number. After clicking on the number, you will find the details regarding it listed to the left.

You may remove items from the order by selecting the remove from cart icon in the item description.

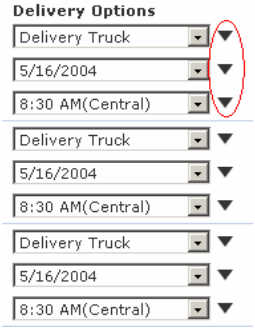
Quantities for each item may be assigned either universally (such as one set of "Current Set" for each recipient), individually or through a combination of both methods. To set a universal quantity, type in the number in the quantity box and use the 'apply over' arrow or 'apply down' arrow to assign to all users.

Individual quantities may be assigned by simply typing in the quantity in the appropriate box. Although you may have utilized the universal quantity tools, you may override any of these settings by simply typing in the correct amount.

Delivery Options

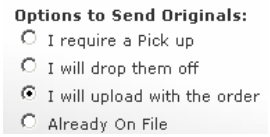
As with items in the shopping cart, delivery options may be assigned universally, individually or a combination of both. Select a delivery method, due date and due time. You may apply this information universally by utilizing the 'apply down' arrows.

Note: Each field has its own drop down arrow therefore applying information universally requires 3 different 'apply down' arrow clicks.



Sending the Originals Options

You will need to specify the appropriate method for your reprographer to receive the documents you are ordering. You may choose to send the originals through the following four options: "I require a pick up", "I will drop them off", "I will upload with the order", or "Already on file". If in step one you browsed to the location of your file, by default "I will upload with the order" will be selected.



Returning the Originals Options

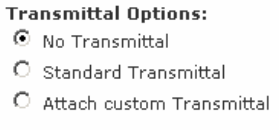
You will need to specify what you would like the reprographer to do with your original files. You may choose to have the originals returned to the following three options: "Sender's Address", "Different Address" or "Keep on file".

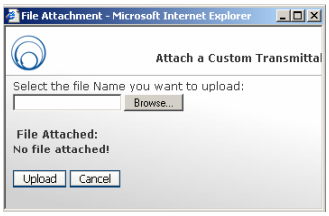
Note: If you select "Different Address", you will be prompted for the address.

Transmittal Options
The final step on the Delivery Options window is to specify transmittal options. You may select “No Transmittal”, “Standard Transmittal” or “Attach Custom Transmittal”.

By selecting “Standard Transmittal”, you will have additional options to customize text in the transmittal. This may be done by selecting the desired recipients, typing in the customized text and choosing [Save]

By selecting to attach a custom transmittal, you will be brought to a dialog box which will allow you to browse to the location of the desired transmittal.





Finally, you will need to specify which location you would like to place this order to. Note: This is only necessary if your reprographer has multiple locations.

When all required information has been completed, you may proceed with your order by selecting [Next].

Step 3: Review
The review window will allow you to see all details of the order. Where available, you may also see a price quote for all items ordered.

Once you have carefully reviewed the order, you may finish the order process by selecting [Submit Order]

Step 4: Submit
You will be informed of your successful order submission on this final order processing window. You will be provided with an order number and will have the opportunity to print the distribution, print the complete order or return to the project home.

Uploading Files
If you specified that you would upload your files with the order, the upload window will now automatically appear. All files indicated will be listed in the window and you may send these files via FTP by choosing [Upload Now].

You may watch the progress of your upload in the lower window. After all files have uploaded, you will see an “Upload Successful” message in the progress window.

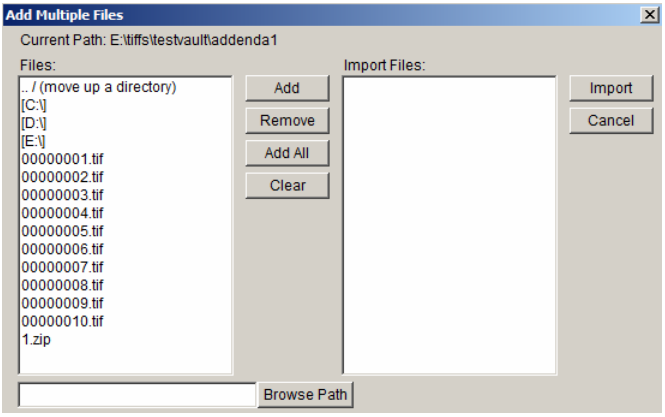
Uploading Multiple Files
At the beginning of the EWO section of this manual, it was discussed that when attaching digital files, it must be done by selecting one file or one .zip bundle at a time. Within the upload applet, you have the option to add multiple files at one time. Any changes to the four step ordering process necessary to complete this process are outlined below.

Step 1: Print Options
Follow the steps outline above for step 1 however type in a description of your file rather than attempting to browse to a file. It is important that you accurately indicate the number of files you will be uploading.

Step 2: Delivery Options
All functions in step 2 remain the same as outlined above however you must indicate that you will upload the files with this order.

Step 3: Review / Step 4: Submit
All functions remain the same as outlined above.

Upload Applet
When the upload applet appears, click on the option [Add Multiples].



Add Multiples Window

Within the add multiples window, double click on the drive letter and continue to double click on folders until all desired documents are listed. Choose [Add All] to add all files. It is important to note that although drive letters in the above example are still shown, it is only the files that will be added.

Choose [Import] to add these files to the main upload applet and then complete the upload process as outlined above by choosing [Upload Now].

Conclusion:

This concludes the PlanWell EWO Quick Start Guide. As mentioned throughout this document, more details of the EWO program can be found in the PlanWell EWO User Guide.